14 OPERATING ANALYSIS – YEARS 0 TO 4

14.1 Start Up Expenses (2018-19)

It would be necessary to incur operational expenses prior to the opening of the facility. This will be necessary to ensure that the team are in place for opening and the program model has been built up. It is assumed that each Scenario would require operating costs of $872k in the year before opening for:

- Staff Costs;
- Marketing; and
- Administration (legal and contractual work to establish governance model).
- Website development

These estimates are preliminary only at this stage and would require more detailed evaluation as part of subsequent financial reviews.

14.2 Year 1 to 4 Utilisation

The Operating Analysis has focused on Year 5, as it is assumed this is the basis of 'steady state' and used for each year thereafter. The operating assumptions for Year 1 to Year 4 have assumed that there would be a steady progression to the steady state. This is illustrated in the table below with the Primary Theatre utilisation of 188 days:

	Year	Utilisation Days p.a.	Comments
1	2019-20	93	50% of Steady State
2	2020-21	116	Previous year plus 23 days
3	2021-22	139	Previous year plus 23 days
4	2022-23	162	Previous year plus 23 days
5	2023-24	186	Steady State

The majority of the income and expense items are based on the same assumptions as above. In reality the facility may enjoy an initial 'honeymoon' period where Year 1 and Year 2 have higher use than above.

14.3 Building Maintenance

Year 1 should have a low cost as covered by defects and a minor cost of $251k is included. Likewise in Years 2 to 4 it is reasonable to assume that there should be fewer repairs than in future years, and therefore lower building maintenance costs have been assumed until steady state.

14.4 Subsidy Years 0 to Year 4

The table below summarises the total operating subsidy estimated for each Scenario from the year before opening up to year 4. Also shown is the average subsidy per year. It is expected that the costs would be less than Steady State as there would be some costs (e.g. Repair, Maintenance, Cleaning, Security) would be less than Steady State).

Subsidy Years 0 to Years 4		Concept Design Business Case (Dec 2015)	Scenario1 Worse Case	Scenario2 Idealistic	Scenario3 Realistic
Total Operating Subsidy (excl. interest & depreciation)	*$000s*	($3,518)	($5,203)	($2,934)	($4,146)
Average Subsidy per year	*$000s*	($704)	($1,041)	($587)	($829)

TOTAL IMPACTS

15 CAPITAL RENEWAL

15.1 Basis of Assumptions

The assumptions still used for all Scenarios is the same as the previous Business Case, which are internal City estimates with reference to the City's Building Asset Management Plan. Paxon have provided alternative information regarding replacement cycles. The Paxon information indicates that capital should be replaced much earlier than indicated in the assumptions below, and that a total of $276m should be included in the 40 year cashflows for capital replacement. At present the City has included $79m in the estimates so the Paxon estimates would increase the cash flows by $196m.

The City has chosen not to use the Paxon replacement profile because it does not agree with the earlier life cycle and there is insufficient information or examples to support the proposal. For example it was suggested that $8.5m should be planned every 7 years for fitments. It is recognised that capital replacement is important but it was deemed unlikely that the facility would require $8.5m every 7 years.

The large disparity between the estimates is a risk and a concern that requires further investigation.

15.2 Components

For the purposes of capital renewal planning, construction costs are broken down into 6 different components, this analysis was based on the Citys Building Asset Management Plan.

Structure	72%
Roof	8%
Fixtures & Fittings	3%
Services(1) - Long Life	13%
Services(2) - Short Life	2%
Equipment	3%
Total	100%

15.3 Renewal Life

The table below summarises the estimated renewal life of each component. The first column shows the maximum life that each component could have. An assessment is then based on whether the component would be renewed at Condition 5 (full maximum life) or whether there would be a "Condition Intervention"). The Condition Ratings (from 1 to 5) are based on standard Asset Management practice (reference International Infrastrcuture Manual). For building assets it is assumed that Fixtures & Fittings, Services-short life and Equipment would be replaced before they deteriorate to Condition 5, and before they reach their maximum useful life.

	Maximum Life	Condition that asset maintained to	Renewal Life based on condition
Structure	80	Condition 5	80
Roof	80	Condition 5	80
Fixtures & Fittings	40	Condition 3	24
Services(1) - Long Life	40	Condition 5	40
Services(2) - Short Life	20	Condition 4	16
Equipment	20	Condition 4	16

15.4 Renewal Projections

Based on the split of Capital Cost of Component and the Renewal Life above, a 100 year renewal plan has been prepared. Within the financial evaluation included within this report (up to 2058-59), which includes 40 years of operation a total of $24m (excluding escalation) has been included, this is split in 4 lumps only (2034/35, 2042/43, 2050/51, 2058/59).

15.5 Sinking Fund not Recommended

Some external consultants (Paxon and AEG Ogden) have suggested that a sinking fund i.e. Reserve is used to set aside cash each year for future capital replacement, rather than have large lumps of expenditure in future years. This is not recommended because it is better from a Treasury management perspective for the City to plan for the cash as it is required rather than set aside each year. Indeed no examples could be provided to the City of other facilities who have a sinking fund.

The other argument for setting up a sinking fund is that it gives the City a better overall view of the annual financial costs of the facility by setting aside an annual cash budget for future replacement, rather than intermittent lumps. Whilst there is some merit in this, the true operating performance for the facility will be the operating results which would include Depreciation. As long as Deprecation is based on current costs and based on real consumption of the asset then the operating results will be a reliable gauge for the bottom line of the facility.

15.6 Depreciation Factors

The component lives in Section 15.2 are the lives that would be used for the basis of Depreciation charges and have been used to calculate the annual Depreciation charge of $1.5m per year. The $1.5m works out at oveall life of 67 years.

16 TOTAL CASH FLOWS TO 2058-59

16.1 Total Cash flows 2014-15 to 2058-59

The whole-of-life cash flows have been projected up to 2058-59. This covers the period of construction and 40 years of operation. By evaluating over such a long period ensures that the long-term impacts including capital renewals can be evaluated. The table below summarises the overall cash flow impacts, this table includes all of the cash flows in the previous sections (Capital Costs, Funding, Capital Renewals, Operating assumptions, Escalation).

The rage of possibilities is influenced greatly by the different operating subsidy which may be incurred. Scenario 1 with an operating subsidy of over $1.1m per year would result in an overall Cash flow of $244.9m, whereas Scenario 2 with an operating deficit of just over $0.5m would be $184.6m. Meanwhile Scenario 3 with an operating subsidy of $863k has an overall cash flow of $217.5. Scenario 3 is $17.3m higher than the previous business case.

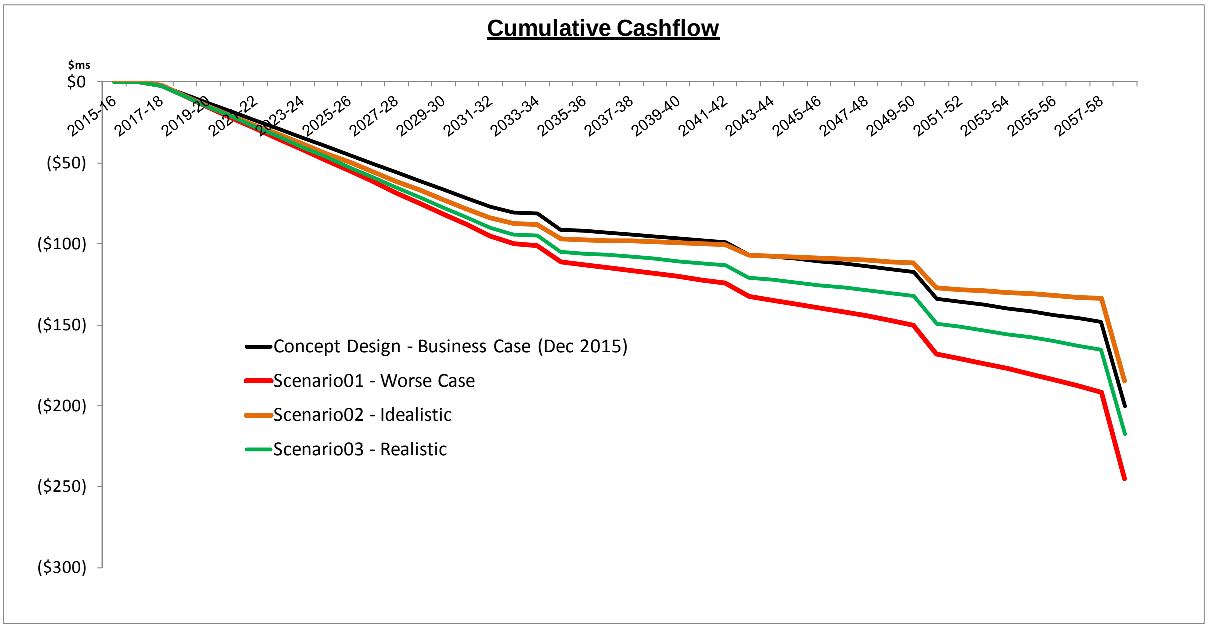
The range of differences between the scenarios is considered to be reasonable at this stage of a $100m project.

Option Summary Total Cash Flows up to 2058-59 including escalation			**Concept Design**	**Scenario1**	**Scenario2**	**Scenario3**
			Business Case (Dec 2015)	**Worse Case**	**Idealistic**	**Realistic**
Establishment Costs						
Capital & Other One-Off Costs		*$ms*	($103.0)	($105.3)	($105.3)	($105.3)
Grants and Reserves		*$ms*	$55.2	$47.5	$47.5	$47.5
Borrowings		*$ms*	$47.8	$57.8	$57.8	$57.8
Repayments		*$ms*	($47.8)	($57.8)	($57.8)	($57.8)
Establishment Costs		*$ms*	**($47.8)**	**($57.8)**	**($57.8)**	**($57.8)**
Operating Impacts						
Operating Expenses incl. Interest		*$ms*	($333.3)	($426.7)	($368.8)	($400.5)
Operating Income		*$ms*	$260.4	$319.0	$321.5	$320.2
Operating Deficit incl. Interest		*$ms*	**($72.9)**	**($107.7)**	**($47.3)**	**($80.3)**
Asset Replacement		*$ms*	($79.4)	($79.4)	($79.4)	($79.4)
Total Project Cash flows		*$ms*	**($200.2)**	**($244.9)**	**($184.6)**	**($217.5)**
Ranking		*Rank*		3	1	2
Diff to Concept Design	$000s	*$ms*		($44.8)	$15.6	($17.3)
	%	*%*		22.4%	-7.8%	8.6%
Net Present Cost		*$ms*	($84.3)	($104.0)	($83.0)	($94.4)

The Net Present Cost is the sum of all the cashflows discounted back to today's values. The difference between each of the Scenarios follows the same trend as the overall Project Cash flows.

16.2 Cumulative Cash Flows

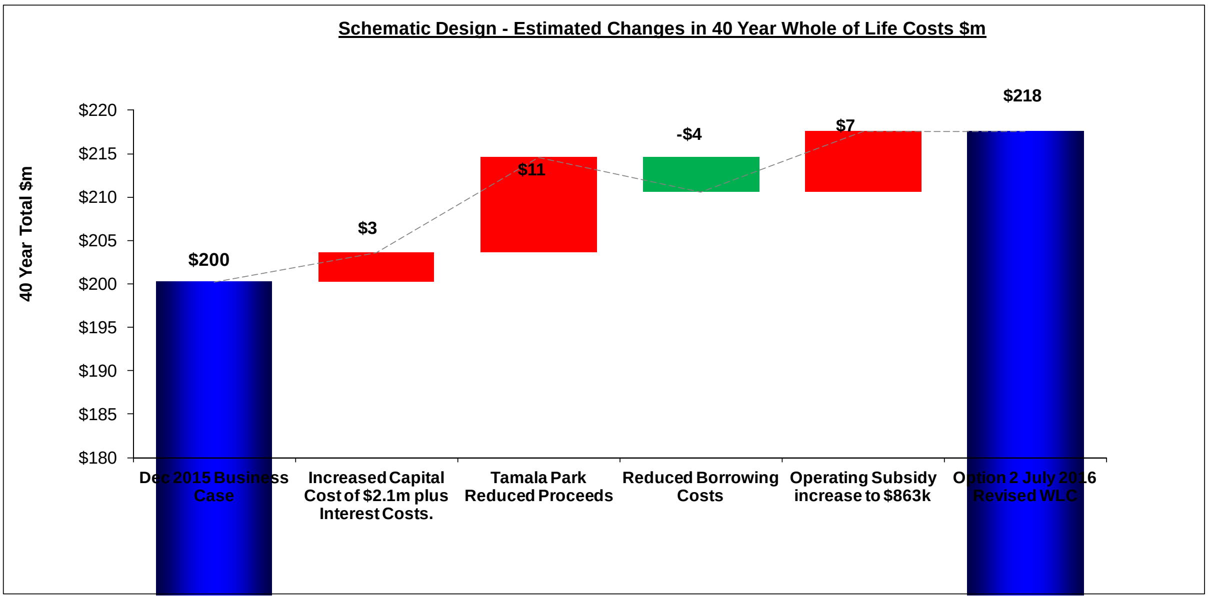
The graph below shows the cash flows on a cumulative basis. The cash flows for the first 15 years include the cost of loan repayments and therefore the reductions are steeper than later years. The trend in costs for each Scenario is similar to the previous business case. The spikes in 2034-35, 2042-43, 2050-51 and 2058-59 are due to the capital renewal costs.



16.3 Comparison of Cashflows to Previous Business Case

The chart below summarises the changes in the revised estimates (Scenario 3) compared to the Concept Design assumptions in the previous business case. This shows that the project costs have increased by approx $18m, and this is broken down into 4 main causes:

- ($3m) for Increased capital costs, including the cost of interest
- ($11m) for reduced Tamala Park proceeds, including the cost of interest
- $4m benefit for the reduced costs of borrowing (lower interest rate)
- ($7m) due to the higher operating subsidy of $863,000 pear year



SCENARIO EVALUATION

17 SCENARIO EVALUATION

17.1 Value for Money Concepts

The investment costs are significant, for example they are approximately equivalent to one year's worth of rates income. It is therefore crucial to consider whether the scope of the Arts Box and the size of the investment provide value for money.

The design team have extensive experience in the interrogation of conventional construction methods, combined with new modelling technologies to deliver world-class venues with tight budgets. Recent examples include the Melbourne Theatre Company Southbank Theatre, Melbourne Recital Centre and Hamer Hall redevelopment.

The JPACF has gone through value management processes to ensure that both the best design criteria and budget are met. Value management is an attitude within the design team to continually question whether emerging design solutions really represent the best value for money for the project. This process relies on both innovation (for example, consolidating unexpected areas of program) and strategy (for example, not spreading scarce budget out over large areas of the project, but concentrating it into areas where there is a real and perceived benefit).

The design team are committed to the innovative use of ordinary building materials and methods – using known technologies in creative and unusual ways. The Design Team strive for maximum impact without maximum cost. The adScenario of this philosophy has benefits to the long term maintenance and life-cycle costs of the facility.

17.2 Value for Money Examples in the Design

Some examples of how value management has been employed in the concept design of the JPACF include:

- Locating the car park above ground instead of in basement levels. This saves the project approximately $6m in capital cost. The car parking levels also assist in the scaling up of the building to help in generating a critical civic mass, particularly in the context of the Lakeside Joondalup Shopping Centre. The car park is able to be naturally ventilated and the rest of the building is freed from the constraints of mechanical ventilation from a basement car park. The car park is also directly connected to the building at ground level, and the surrounding gardens, for ease of access and security.

- Combining the community and conference areas. It made sense to cluster together the studios for crafts and visual arts, with some of the lesser-utilised spaces such as ancillary rehearsal rooms and conference rooms, allowing them to be flexibly programmed for anything from dance classes to community meetings, and to share amenities.

- Providing a diverse mix of spaces which can be zoned for multiple event use, catering for a large pool of events. This ensures the building is utilised as fully as possible, and also saves on operating costs as areas of the building are able to be used independently – for example, the car parking and community studios can be used during the day while the theatres and main foyer are closed. The building aims to be activated 12 hours a day, 7 days a week.

The cost rates used are benchmark rates based on a combination of other projects, recently priced Bills of Quantities, pricing books and supplier prices where appropriate. The rates therefore reflect, as far as practically possible at this stage, the current market pricing for each component of work. The rates will evolve over time as the design and engineering develops.

17.3 Cost per Seat Comparison to Other Facilities

The design team also sense-check the different budgets for various functional areas against other projects. It is very difficult to ascertain a true comparison as each performing arts venue is unique, and therefore will have different overall function area allocations – for example, the inclusion of other functions additional to the actual auditorium space. The table below provides a comparison of the JPACF construction cost to other facilities, the issues to note are:

- Arts Facilities will tend to cost at least $60m. The only exception to this in the table below is a regional facility with just 478 seats, which is not a useful comparison
- JPACF cost per seat is estimated at $93,178, which is lower than 3 other facilities. Taking account of the other features of the JPACF (374 car park, gallery, conference rooms), this cost provides good value for money by comparison.

Facility	Details	Cost #1 $m	Seats #2	Cost per Seat
JPACF	Theatre, black box, community/conference, gallery, 374 bay car park,	$99.7	1,050	$94,952
State Theatre Centre of WA	Lyric Theatre, black box, courtyard, 2xRehersal rooms	$99.4	809	$122,833
Albany Entertainment Complex	Lyric theatre, studio, function facilities, 135 bay car park	$78.4	820	$95,610
Regional Performing Arts Centre (Confidential)	Not available	$31.0	478	$64,854
Melbourne Theatre Company - Southbank Theatre	Single-rake theatre, black box/rehersal room	$61.6	650	$94,742
Melbourne Recital Centre	Concert hall, salon.	$88.6	1,130	$78,373

#1 Capital Costs are based on 2016 dollars
#2 Seats relate to the total of the Primary Theatre and Secondary Theatre

17.4 Key Indicators – Impacts per Ratepayer

The table below summarises some key indicators for the Investment and ongoing Subsidy:

- Cost per Ratepayer for the Capital cost is $1,576 for Scenario 3
- Subsidy per Ratepayer per year is $13.64

This type of information may be useful to assist with the public consultation and to help the public understand that whilst the JPACF has a high cost, and high ongoing subsidy, the impacts per household are minimal. Indeed when the benefits (social, economic) are considered many ratepayers would no doubt agree that the cost of $13.64 per year is a worthwhile cost to bear for such a facility e.g. that relates to 3 cups of coffee per year.

	Key Indicators		Concept Design	Scenario01	Scenario02	Scenario03
			Business Case (Dec 2015)	*Worse Case*	*Idealistic*	*Realistic*
	Summary Data					
1	Capital Costs, excl. escalation	*$000s*	($97,631)	($99,738)	($99,738)	($99,738)
2	Ratepayers (Dwellings and Business)	*$000s*	63,296	63,296	63,296	63,296
3	Subsidy (Year 5) excl. escalation	*$000s*	($818)	($1,150)	($529)	($863)
4	Income (Year 5)	*$000s*	$2,535	$3,160	$3,187	$3,173
5	Attendees	*Qty*	97,400	95,350	95,350	95,350
	Key Indicators					
6	Capital Cost per Ratepayer	*$*	($1,542)	($1,576)	($1,576)	($1,576)
7	Subsidy per Ratepayer per Year	*$*	($12.92)	($18.16)	($8.37)	($13.64)
8	Income per Attendee	*$*	$26.03	$33.14	$33.42	$33.28

17.5 Non Financial Evaluation

The table below provides some comments as to how each Scenario achieves the non-financial objectives of the project.

Ref	Issue	Details
1	Imagination & Creativity	o Arts Box Model has a wider scope than a Traditional Performing Arts Centre and will encourage greater imagination and creativity. o There is more attendees per year with Arts Box Model
2	Inclusive Environment	o Arts Box model has the ability to be open 7 days a week, 12 hours per day. Meanwhile a Traditional Performing Arts Centre may only be open for performances and is far less inclusive. o Arts Box Model will have multipurpose spaces which can cater for a variety of different uses
3	Viability & Attraction	o The design for Arts Box would be much more attractive than the design for a Traditional Performing Arts Centre. It is clear that the design would be an iconic landmark within the City.

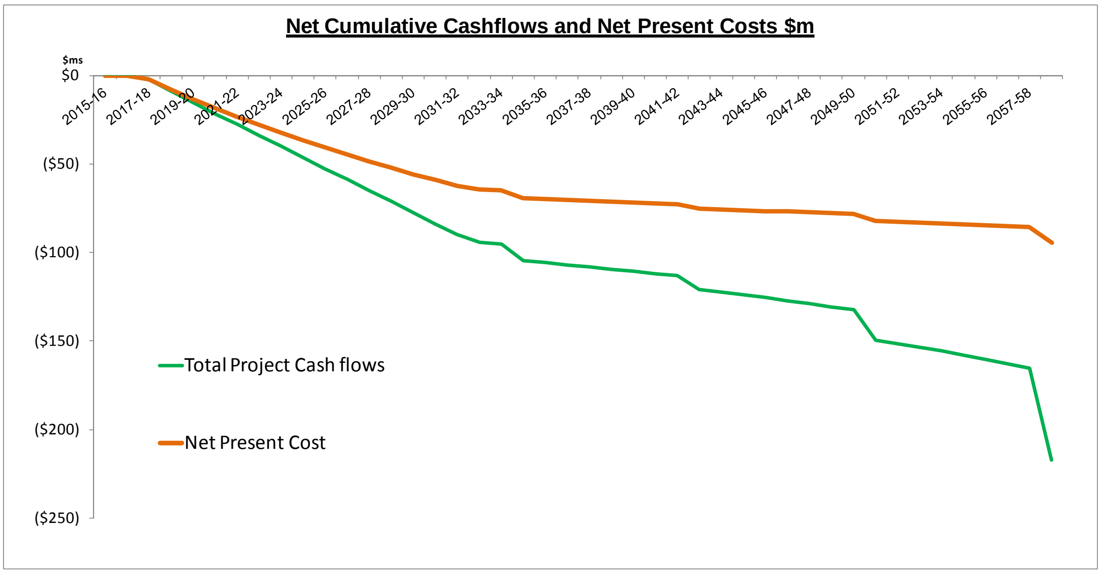
SUMMARY

18 IMPACTS FOR CITY OF JOONDALUP

18.1 Financial Summary of Scenario 3

Scenario 3 is used as the basis of the Business Case and would require the following commitment by the City:

- Investment of $99.7m (excluding escalation)
  - $1.9m Sunk Cost
  - $97.8m is a future investment
- Grant assumption of $10m from National Stronger Regions Fund
- Borrowings estimated of $58m, which would result in an interest expense of $23m
- Additional Depreciation of $1.5m
- Operating Subsidy of ($0.9m) per year
- Total impact over a 40 year period of $217.5



18.2 Cash Flow Expenditure Years 1 to 15

The table below summarises the total cash expenditure per year on average for the first 15 years. This table shows that there will be an average of ($2.4m) per year that impacts on Operating Cash Flow (#1 this excludes Depreciation), this comprises of the ($0.9m) Operating Subsidy and the Interest on borrowings of ($1.5m) per year. The borrowings of $57.8m will result in an average repayment over 15 years of ($3.9m) per year. Therefore the total cash outlay for the project in the first 15 years is an average of ($6.2m) per year.

However it should be noted that the City expects to receive additional proceeds from sale of Tamala Park Reserve of $47m, an average of $3m per year over the same timeframe.

	Cash Flow Expenditure Years 1 to 15	$m
	Operating	
1	Annual Cash Subsidy, excluding interest	($0.9)
2	Interest Costs Average p.a.	($1.5)
3	Operating Cash Impacts #1	($2.4)
4	Principal Repayment on Borrowings	($3.9)
5	Cash Flow Expenditure Years 1 to 15	($6.2)

18.3 Budgeting for the JPACF

The City budgets for projects using the following:
1. Annual Budget
2. Mid Year Review
3. 5 Year Capital Works Program
4. *20 Year Strategic Financial Plan*

Each of the plans is updated annually and the JPACF project will continue to be updated in the City's budgeting tools.

The 20 Year Strategic Financial Plan was recently (June 2016) adopted by Council. This included assumptions for the JPACF based on the December 2015 Business Case:
- $97.6m Establishment Cost
- Operating Subsidy of $818k per year

The recommended Scenario now has additional establishment costs of $2.1m and higher operating subsidy of $45k per year. These changes would not affect the projected achievement of ratios within the Adopted 20 Plan. The 20 Year plan is updated annually with the next update commencing in February 2017, the most up-to-date JPACF assumptions will be included then.

18.4 Guiding Principles / Key Ratios

At the heart of the City's *20 Year Strategic Financial Plan* are a set of guiding principles, which include 5 key ratios that the City uses to evaluate financial sustainability in the long term. The Adopted 20 Year Strategic Financial Plan provides detailed commentary on each of the ratios, which can be separately referred to. The plan also includes comments regarding the JPACF project as it has significant impacts on the projections.

The City has undertaken informal discussions with West Australia Treasury Corporation regarding the capacity of the City to borrow funds for the JPACF in 2017-18 and 2018-19, especially as the proposed borrowings would be much higher than any previous borrowings by the City – WATC evaluated the City's proposed borrowings and confirmed that the City would have capacity. However it should be emphasised that the evaluation was based on the projections within the Adopted 20 Year Strategic Financial Plan which includes high assumptions for Rates Increases in the next few years (between 4% to 5%). The City has recently (2016-17) implemented a 2.5% rate increase and if the increases for one or more of the next few years were less than 4% this would present a material risk of the City's capacity to borrow for the JPACF.

19 RISKS, OPPORTUNITIES AND SENSITIVITY ANALYSIS

19.1 Risk & Opportunities - Overview

This business case does not contend that the projections will come to pass exactly as stated above. **The project will not cost $217.5m, that is only an estimate, it will either cost more or it will cost less.** The business case includes assumptions which may be different for any number of reasons. It is therefore vital to evaluate the risks and opportunities with the business case, so that actions can be considered to mitigate the risk and alternative opportunities considered.

There is a higher probability of the overall project costs increasing than decreasing. There is a lot more certainty that the costs will come to pass as expected, but there is a lot more uncertainty that the income or funding will come to pass as projected.

The comments on specific risks and opportunities will be analysed separately for each set of cash flows:

1. Capital Costs/Funding.
2. Operating Analysis.

Financial impacts will follow the same convention as used throughout the report i.e. Risks (adverse impacts) are negative and Opportunities are positive. The risk has also been assessed using the City's Risk Management Framework with the risk consequence, impact and level subject to comment within the analysis.

The sensitivity analysis and risks are as important as the projections in the rest of the paper so that the full potential impacts can be considered.

19.2 How the Project Costs have changed over time and the Confidence of the Estimates

The Establishment Costs of the project have increased a number of times during the project, but the increases have become lower as the accuracy and detail are refined. The table below summarises the movement in capital costs since 2009. At 2009 the project costs were crudely estimated at $35m and included in the 20 Year Strategic Financial Plan – there was no detailed audit trail for the $35m, the costs were merely a marker for inclusion in the 20 Year Strategic Financial Plan. Meanwhile in 2012 the costs were increased to $50.6m but again without any detailed QS Costings – the other key issue regarding the $50.6m is that it was based on a Traditional Performing Arts Centre as opposed to an Arts Box which has a much wider scope. The estimate for an Arts Box was first considered in 2013 following the Pracsys Feasibility Study and since then the estimates have become more refined.

The table below also includes a scale to indicate the confidence of the assumption. This shows that the estimates in 2009 and 2012 had no or little confidence. The confidence steadily improves over the past few years, although even at this stage the estimates cannot yet be determined as being 100% accurate, these uncertainties will only be resolved after Detailed Design and tender.

	Stage	$m #1	Confidence of Estimate #2	
1	**2009 Adopted SFP**	**$35.0**	1	High Level estimate only, no detailed basis for the estimate i.e. no concept design
2	**2012 Adopted SFP (Nov 2012)**	**$50.6**	1	High level estimate only of a Traditional Performing Arts Centre, as opposed to an "Art Box"
3	**Pracsys Feasibility Study (March 2013)**	**$79.5**	2	Council resolved to increase scope of the facility to "Art Box" rather than a traditional Arts Centre. Costings were based on Rough Order of Magnitude only and not a detailed QS
4	**Concept Design (April 2014)**	**$90.7**	3	Based on ARM Concept Design from the Architectural Design Competition (2013). Costings included a QS Elemental Breakdown but were Concept Design only
5	**2014 Adopted SFP (Jun 2014)**	**$94.2**	3	Costs were increased to include Jinan Gardens and escalation since the 2013 Design Competition
6	**2015 Adopted SFP (Dec 2015)**	**$97.6**	3	Increase to take account of Traffic Treatment, External Works and escalation
7	**Schematic Design (July 2016)**	**$99.7**	4	Confidence of estimates has improved, although there is still some risk in the estimated rates.
8	**Detailed Design**		5	Detailed Design / Tender will provide certainty on the costs

#1 Excludes escalation
#2 Confidence of estimate is based on a scale of 1 to 5, where 1 has no confidence at all and 5 is very confident

19.3 Establishment Costs - Capital Costs and Funding - Risk & Opportunities

The table below lists various risks and opportunities and their potential impact on the capital costs or funding. The total best case is that the Establishment Costs may be $4m lower, but the Worse Case is a total worsening cash flow of ($37m). In summary, there is much more probability that the establishment costs will worsen than they will improve.

	Risk / Opportunity		Cashflow Impact $m			Risk Classification and Actions
	Subject	Details	Worse Case	Mid	Best Case	
1	**Capital Costs higher than estimated**	The costs at Schematic Design are not final; the Detailed Design stage will provide further refinement whilst the tender/procurement stage will also provide changes. Therefore the Capital Costs of $99.7m must be recognised as an estimate based on a set of assumptions – the final outcome will NOT be $99.7m, it will be higher or it will be lower. ARM has provided an evaluation of the range of probabilities for some of the most expensive capital items. This indicates a high level of confidence in the volume assumptions but a lower level of confidence in the rates. The evaluation has been used to prepare the overall worse case increase that could arise or the best case reduction in costs. This indicates the following: - Best case is that the costs may be $95.7m instead of $99.7m, a reduction of $4m - Worse Case is that the costs could be $113.7m, an increase of $14m. However it must be emphasised that this is an extreme worse case.	($14m)	($5m)	$4m	o This likelihood is POSSIBLE, the consequence is medium and therefore the overall risk score is LOW. o The risks of the capital costs increasing can be managed as follows - All future specification changes are evaluated individually with a Cost/Benefit Analysis taking account of operational implications - Capital Costs remain as they are in the business case and the project needs to find ways to manage the cost increase. This could be achieved by reviewing other design issues, or managing the procurement process to ensure that the overall costs remain within budget. - Contingency already included in the Capital Cost estimates and may be sufficient to cover the costs of these additional items - Tender has the opportunity (particularly in the current market place) to provide cost reductions which cover the risks of unforeseen costs.

		Some examples of where costs may increase are: - Easement access with TAFE. If easement access is not provided then mechanical ventilation would have to be provided at the Car Park (additional $0.6m) - PV Cells ($0.5m)				
2	**Reserve Funds not available**	The funding assumes that $37m is provided in total from Reserves to contribute to the construction of the facility. At present (June 2016) there is $20m within designated reserves, so a further $17m is projected in the next couple of years. The majority of this relates to further proceeds from Tamala Park. The proceeds from Tamala Park can no longer be classed as guaranteed due to a range of economic factors at local, state, federal and global level.	($4.0)	($3.0)	$0.0	o The likelihood of not receiving some of the $27m is possible, and the consequence is medium, the overall risk is MODERATE. o The City should continue to research other opportunities to dispose of land (or indeed buildings) that have minimal usage.
3	**Borrowings not within Capacity**	Proposed borrowings not approved by WATC. Informal discussions have taken place with WATC to review the borrowing impacts, the capacity of the City to borrow and the impacts on the Adopted *20 Year Strategic Financial Plan*. These discussions confirmed that the City would have capacity based on the projections within the 20 year SFP.	($5.0)	($3.0)	$0.0	o It is now classed as possible that the City would implement Rates increases within the next few years which are less than 4% or 5%. This would present a material risk to the projections in the 20 year SFP and the capacity for the City to borrow. o The consequence is major, and the overall risk is therefore MODERATE. o The City should continue to have informal discussions with WATC
4	**Grant of $10m not approved**	The projections include an assumption that the City will be successful with an application to the National Stronger Regions Fund (NSRF). A 'Round 2'	($14m)	($7m)	($0m)	o The likelihood is likely, the impact is medium, and the overall risk is moderate. o The City should continue to review other potential sources of funding e.g. State.

		application was made in July 2015 and failed, so it is possible that the 'Round 3' application made in March 2016 will not succeed either. The total impact (Worse case) would be $14m as additional borrowings would be required to bridge the gap which would attract interest costs of $4m.				o It may be worthwhile for the overall case to be reconsidered if the Grant Application is unsuccessful.

19.4 Potential Opportunity – Cap the Establishment Costs at $97.6m

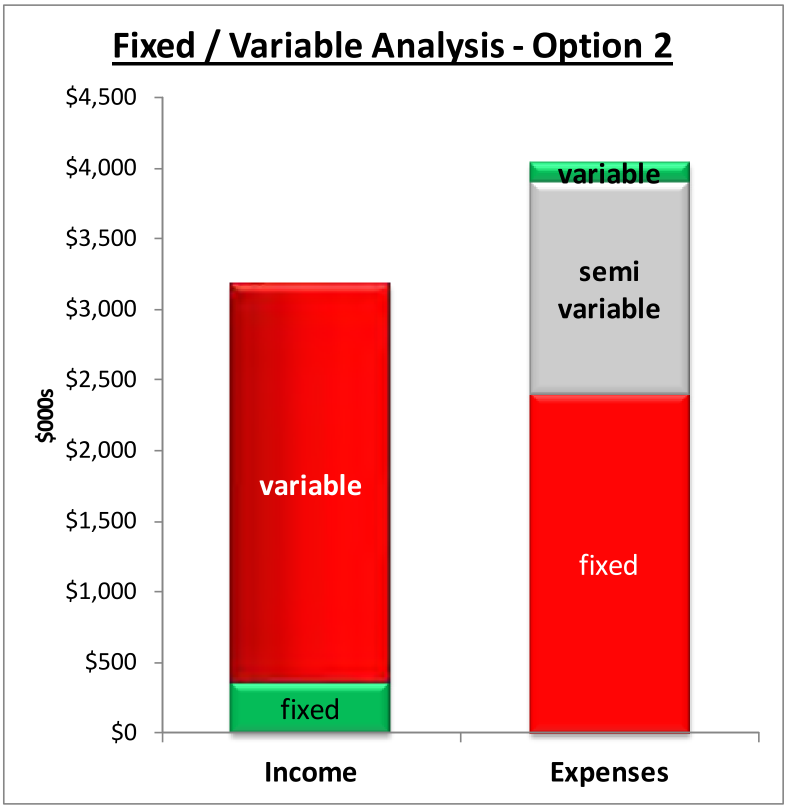
The previous Business Case (December 2015) indicated an overall cost to establish the project of $97.6m. The $97.6m estimate was used to update the recently adopted 20 Year Strategic Financial Plan. The revised estimates for the favoured Scenario 2 are $2.1m higher, with a total revised cost of $99.7m. It may be worth capping the capital costs at $97.6m and reducing some parts of the specification. Indeed going forward it may be worthwhile to place a cap on the project costs and ensure that any other increase in the capital costs are offset with reductions in other elements.

19.5 Operating Analysis - Risk & Opportunities

It is impossible to predict exactly what the subsidy will be each year; there are a vast number of assumptions, internal factors, external factors and unknown variables that will impact on the subsidy each year. Before evaluating the possible changes, the key issue to consider is the nature of the income and costs, whether they are fixed (i.e. certain to occur) or variable (uncertain). Each of the income/expense items have been separately categorised as fixed, variable or semi-variable, so that the un/certainty can be summarised. The graph below for Scenario 3 financials at Year 5 summaries the outcomes of this analysis, the key issues are:

- Vast majority of the income is variable i.e. there is no guarantee that just by opening the facility that people will buy tickets, people will hire the spaces, eat there or park there.

- Majority of the Expenses are fixed (e.g. staffing), in that the expense will occur whether or not there are hires or ticketed events.



In summary the analysis informs us that the JPACF operating model provides a significant level of risk that the subsidy could be higher than ($0.9m) because there is uncertainty with most of the income but high certainty of most of the costs.

The table below evaluates some of the financial risks and opportunities of the annual Operating Subsidy.

	Risk / Opportunity		**Subsidy Impact $m**			**Risk – How to Mitigate / Opportunity – How to Exploit**
	Subject	**Details**	**Worse Case**	**Mid**	**Best Case**	
1	**Audience Activation**	By year 5, the program and audience need to be well developed to achieve industry standard utilisation and a subsidy of ($0.9m) per year. There will need to be significant effort in Years 1 to 4 to help develop the program/audience. There is a risk that the subsidy will be higher than ($0.9m), comparison to other facilities confirms this whilst the nature of the cash flows (uncertainty of income but certainty of costs) is another key factor. Therefore the worse case is that the subsidy could be ($1.0m) higher i.e. a total subsidy of ($1.9m) per year	($1.0)	($0.5)	$0.0	o This likelihood is possible, the consequence is major and therefore the overall risk score is MODERATE. o Full consideration of how to activate the facility is crucial so that the Year 5 Financial Targets can be achieved, e.g. - High profile company to activate Restaurant space in its own right - Encourage (large discount ?) a company to become resident in the space for the first couple of years (at least) to help build a name for the facility - Program built up 1 to 2 years before facility opens
2	**Conferences, Exhibitions, Studios, Gallery**	There is now much higher income included in the projections than previous estimates.	($0.2)	($0.1)	$0.0	o This likelihood is possible and the consequence is minor and therefore the overall risk score is LOW. o Continue to review the utilisation assumptions.
3	**Finance Officer**	The projections now assume a full-time Finance officer within the JPACF. There is an opportunity for the financial support to be provided by the COJ Finance team.	$0.1	$0.1	$0.1	o Cost benefit Analysis will be required to justify all staff that the JPACF intends to use, that could otherwise be supported by the City
4	**Occupancy / Catchment Area / Social Economic Profile**	Catchment area in the revised projections is much larger than other Regional Arts Facilities. It is possible that the opportunities for utilisation and occupancy are higher than projected. Additionally the demographics of the catchment area indicate a higher level of education and appetite for arts participation/attendance than average.	$0.1	$0.2	$0.3	o The marketing of the facility should consider the full catchment area ensuring the facility becomes recognised as a regional facility and not just a City of Joondalup facility

		However the City should bear in mind that WA is isolated and it can often be difficult to attract artists to the area.				
5	**Operating Grants**	MPAC receive funding from Federal body to help subsidise some performances (e.g. with travel costs), but this may be discontinued in future as no longer classed as Regional. The Department of Culture Arts have a range of grants available to help support activities but it is deemed unlikely that these could be accessed and mitigate the subsidy	$0.0	$0.0	$0.0	o Further consultation with the Department of Culture & Arts.
6	**Building Maintenance and Utilities**	The revised projections have now increased the Utility and Building maintenance costs based on consultancy advice.	$0.0	$0.1	$0.2	Continue to review the projections for the Building Maintenance and Repair costs. Bottom up analysis (i.e. space by space) required.
7	**Volunteers**	Many Arts Facilities use Volunteers, people who have an interest in supporting the facility	Tbc	Tbc	Tbc	Set up a Volunteer program as early as possible. Analysis of volunteers used by other centres and identification of the possible savings.
8	**Buy a Seat**	Is there an opportunity for patrons to purchase a seat, which provides them with the opportunity of discounted tickets	$0.1	$0.1	$0.2	This could provide the JPACF with additional income, for example $500 per seat x 400 seats. To be investigated
9	**Parking Utilisation**	The projections from Year 15 assume 50% utilisation of the parking bays during the day. This could be higher or lower due to a range of factors e.g. development in immediate area.	($0.2)	($0.05)	$0.2	Continue to review and update utilisation assumptions.
10	**Parking Cost of Sales**	It is now assumed that the existing parking team should be used to assist with operating the parking at the JPACF. However the City could consider at a later point in time that it would prefer dedicated staff during the day	($0.1)	($0.05)	$0.0	Continue to review the operating model for the Parking Facility in conjunction with the Parking Services Team.

19.6 Sensitivity Analysis

The table below summarises the sensitivity of the overall cash flows for Scenario 3 i.e. how much higher or lower than the $217.5 million the outcome may be by 2058-59. The parameters used for the analysis are:

- Capital Costs being higher or lower than the $99.7m currently estimated. It is more likely that the capital costs could be higher than the $99.7m than lower, and therefore the analysis evaluates the impacts of a 30% increase to capital costs but only considers a reduction of 10%. These are evaluated in steps of 5%.
- Operating Subsidy being $400,000 less than the $863,000 estimated or $400,000 more. These are evaluated in steps of $100,000.

Operating Subsidy per year	Cost of Facility Different to $99.7m								
	-10%	-5%	0%	5%	10%	15%	20%	25%	30%
($463)	($165)	($173)	($180)	($188)	($195)	($203)	($211)	($218)	($244)
($563)	($174)	($182)	($190)	($197)	($205)	($212)	($220)	($227)	($253)
($663)	($184)	($191)	($199)	($206)	($214)	($222)	($229)	($237)	($262)
($763)	($193)	($201)	($208)	($216)	($223)	($231)	($238)	($246)	($272)
($863)	($202)	($210)	**($217)**	($225)	($233)	($240)	($248)	($255)	($281)
($963)	($212)	($219)	($227)	($234)	($242)	($249)	($257)	($265)	($290)
($1,063)	($221)	($228)	($236)	($244)	($251)	($259)	($266)	($274)	($299)
($1,163)	($230)	($238)	($245)	($253)	($260)	($268)	($276)	($283)	($309)
($1,263)	($239)	($247)	($255)	($262)	($270)	($277)	($285)	($292)	($318)

The results of the sensitivity analysis indicate that the overall cost by 2058-59:

- Best case could be $165 million which would arise if the capital costs were 10% lower and the Operating Subsidy was $400,000 less
- Worst Case could be $318 million which would arise if capital costs were 30% higher and the Operating Subsidy was $400,000 more.

19.7 Further Reviews of the Financial Projections

The financial projections are based on a set of assumptions. It is not expected that the projections will come to pass exactly as shown. The financials have been, and will continue to be, constantly reviewed, so that the risk and sensitivity of the project can be managed and the forward projections updated in the annual budget, 5 year Capital Works and future updates of the *20 Year Strategic Financial Plan*. Below are some of the key improvements required to the financial projections:

- Utilities – detailed review of each space in the JPACF, the potential usage, power required and detailed Utility forecast. At present the forecast is still high level.
- Building Maintenance & Utility Costs built up bottom up.
- Capital Replacement – detailed review of each capital element (QS Breakdown) and consideration of the likely life cycle.
- Commercial returns of each area. It would be a useful exercise to allocate the income and all costs to each individual space, and compare to the capital costs. This would give an indication of the commercial return/loss of each space.

19.8 Reviews undertaken of the Financial Modelling

The analysis used within the financial evaluation does not contend to be precise. The analysis is deemed reasonable taking account of the assumptions by the project and provides robust supporting information to the Business Case and to assist decision makers with evaluating the project. In support of the Financial Analysis it is worth noting that there have been two external reviews of the Financial Analysis and Financial Modelling:

- November 2015 – external review of financial projections
- 2016 – Integrity Review of Financial Model used for JPACF project

Both reviews provide the City with a high level of assurance regarding the techniques and financial models used in the evaluation.

APPENDICES

APPENDIX 1 – CONSTRUCTION COSTS SUMMARY

Element	2015 Estimate $m	July 2016 $m	Difference $m	Difference %
1 SUBSTRUCTURE	$1.8	$3.6	**$1.8**	**101%**
2 COLUMNS	$1.4	$1.8	$0.4	**28%**
3 UPPER FLOORS	$8.1	$10.3	**$2.2**	**26%**
4 STAIRS	$0.9	$1.0	**$0.1**	14%
5 ROOFS	$6.3	$6.9	**$0.6**	10%
6 EXTERNAL WALLS	$7.6	$7.3	-$0.3	-4%
7 WINDOWS AND EXTERNAL DOORS				
8 INTERNAL WALLS	$5.6	$6.4	**$0.8**	15%
9 INTERNAL SCREENS	$0.2	$0.6	**$0.4**	**244%**
10 INTERNAL DOORS	$0.7	$0.6	-$0.1	-12%
11 WALL FINISHES	$1.3	$1.1	-$0.2	-12%
12 FLOOR FINISHES	$2.6	$2.1	-$0.5	-20%
13 CEILING FINISHES	$1.3	$1.7	$0.3	25%
14 FITTINGS AND EQUIPMENT	$2.6	$4.3	**$1.7**	**64%**
15 SPECIAL EQUIPMENT	$1.0		-$1.0	-100%
16 SANITARY FIXTURES	$0.3	$0.4	$0.1	**48%**
17 SANITARY PLUMBING	$0.5	$0.9	$0.4	**95%**
18 WATER SUPPLY	$0.4	$0.7	$0.4	**97%**
19 GAS SERVICE	$0.0	$0.0	-$0.0	-2%
20 VENTILATION	$0.9	$0.8	-$0.0	0%
21 AIR CONDITIONING	$7.2	$7.3	$0.1	1%
22 FIRE PROTECTION	$3.0	$3.0	-$0.0	0%
23 LIGHT AND POWER	$5.4	$3.8	-$1.6	-29%
24 COMMUNICATIONS	$1.2	$1.3	$0.1	12%
25 LIFT INSTALLATION	$1.3	$1.6	$0.3	**25%**
26 SPECIAL SERVICES	$0.8	$0.7	-$0.0	-2%
27 Replanning Saving		-$1.8	-$1.8	
A TOTAL BUILDING WORKS	**$62.2**	**$66.5**	**$4.4**	**7%**
27 EXTERNAL WORKS	$1.7	$2.6	$0.9	**53%**
28 EXTERNAL SERVICES	$1.4	$1.2	-$0.2	-15%
29 MAIN CONTRACTOR PRELIMS	$8.9	$9.3	$0.4	5%
B CURRENT DAY BUILD COSTS	**$74.1**	**$79.5**	**$5.4**	**7%**
30 DESIGN CONTINGENCY	$3.7	$3.2	-$0.5	-14%
31 CONSTRUCTION CONTINGNECY	$2.9	$2.1	-$0.8	-28%
32 FURNITURE, FITMENTS AND EQUIP.	$0.7	$0.8	$0.0	5%
33 THEATRE TECHNICAL EQUIP.	$2.6	$3.5	**$0.9**	**37%**
34 PROFESSIONAL FEES	$8.8	$7.5	-$1.3	-15%
C ESTIMATED TOTAL COSTS	**$92.7**	**$96.5**	**$3.8**	**4%**
35 TRAFFIC TREATMENT & EXTERNAL WORK	$1.7		**-$1.7**	-100%
36 JINAN GARDENS & CITY PROJECT COSTS	$3.2	$3.2		
D TOTAL PROJECT COSTS	**$97.6**	**$99.7**	**$2.1**	**2%**

APPENDIX 2 – ESCALATION ASSUMPTIONS APPLIED

		2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	and every year until	2058-59
CPI	%	2.5%	2.5%	2.5%	2.5%	3.0%	3.5%	3.5%	3.5%	3.5%	3.5%		3.5%
Employment Costs	%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.5%		3.5%
Utilities	%	3.3%	3.3%	3.3%	3.3%	3.8%	4.3%	4.3%	4.3%	4.3%	4.3%		4.3%
Parking Fees	%	20.0%	16.7%	14.3%	12.5%	5.6%	5.3%	5.0%	5.0%	5.0%	3.5%		3.5%

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Appendix 5 - Economic Activity Report: Australian Performing Arts Centres Association (July, 2015)

2015 Economic Activity Report

Australian Performing Arts Centres Association

www.apaca.com.au

Published July 2016
Prepared by Ruth Hodgman / Visual Focus

Table of Contents

Table of Figures 2

EXECUTIVE SUMMARY 3

Methodology 3

Findings 4

Conclusions 7

INTRODUCTION 8

AIM 8

METHODOLOGY 8

Response Rates 9

FINDINGS 11

Respondents 11

Capacity 13

Financial Snapshot 15

Turnover 23

Expenses 26

Funding 27

Venue Utilisation 29

Activity Levels 30

Programming 32

APPENDIX A: GLOSSARY 37

APPENDIX B: QUESTIONNAIRES 38

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Prepared by Ruth Hodgman

Cover Photo from the production *Lake* by Lisa Wilson
Performer: Hsin-Ju Chiu, Photographer: Fen-Lan Chuang

Table of Figures

Figure 1: Respondents by State ... 10
Table 1: List of Respondents ... 12
Figure 2: Distribution of Respondents by Seating Capacity ... 13
Figure 3: Performance Spaces ... 13
Figure 4: Management Models ... 14
Figure 5: Management Models Used per State ... 14
Table 2: Financial Overview – All Venues ... 16
Table 3: Financial Overview – Venues with Annual Turnover from $0 to $1 Million ... 17
Table 4: Financial Overview – Venues with Annual Turnover from $1 Million to $2 Million ... 18
Table 5: Financial Overview – Venues with Annual Turnover from $2 Million to $5 Million ... 19
Table 6: Financial Overview – Venues with Annual Turnover from $5 Million to $12 Million ... 20
Table 7: Financial Overview - Venues managed within Government or University environments ... 21
Table 8: Financial Overview – Venues managed by Separate Entity ... 22
Figure 6: Average Turnover by Seating Capacity ... 23
Figure 7: Average Turnover by No. of Performance Spaces ... 24
Figure 8: Average Turnover by Distance from the Nearest Capital City ... 24
Figure 9: Average Turnover by State (note: a major city venue excluded from data above) ... 25
Figure 10: Sources of Income ... 26
Figure 11: Expenditure Breakdown ... 27
Figure 12: Total Income from Government ... 28
Figure 13: Sources of Capital Expenditure Funding ... 28
Figure 14: Comparison of Sources of Capital Expenditure Funding 2011 to 2015 ... 29
Table 9: Venue Utilisation by Performance Spaces ... 29
Table 10: Average Utilisation of all Spaces by State ... 30
Table 11: Venue Activity Levels ... 31
Figure 15: Activity Type ... 31
Figure 16: Community -v- Commercial Use ... 32
Table 12: Community -v- Commercial Performances and weighting of Activities per State ... 32
Table 13: Performing Arts Activity Levels ... 33
Figure 17: Performances Involving Financial Risk for Venue ... 34
Figure 18: Playing Australia Funded Seasons as a percentage of Entrepreneurial (risk) ... 34
Figure 19: Playing Australia Funded Performances as a percentage of Entrepreneurial (risk) ... 35
Table 14: Playing Australia Funded Seasons and Performances per State ... 35
Figure 20: State Funding Agency Seasons as a Percentage of Total Arts Events ... 36

EXECUTIVE SUMMARY

The Australian Performing Arts Centres Association (APACA) is the national peak body servicing the needs and interests of performing arts centres and presenters in regional and metropolitan Australia.   APACA's membership base is broad including performing arts centres, independent producers, small to medium dance and theatre companies, festivals, funding bodies, touring organisations, other industry associations and some of Australia's major performing arts companies.

63% of APACA's membership comprises professionally managed performing arts centres located in all corners of Australia from the remote northwest's Broome Civic Centre to the far north's Cairns Civic Theatre to southern capitals such as Hobart's Theatre Royal and The Arts Centre Melbourne and large and small regional centres around the country from The Hopgood Theatre in South Australia to the Dubbo Regional Theatre and Convention Centre in western New South Wales and Darwin Entertainment Centre in the Northern Territory.

The Economic Activity survey has now been conducted with fundamentally the same questions in 2006, 2009, 2011, 2013 and now 2015 giving the opportunity to analyse industry trends.

The aim of the bi-annual survey project is to measure the extent of operations and economic activity of performing arts centres across Australia.

Methodology

The survey was carried out online through Survey Monkey (www.surveymonkey.com) in three parts. The questionnaire was sent to APACA Ordinary Members only, which is those members who manage performing arts venues.

There were 83 responses to Part 1 and 74 responses to Part 2 representing 73.5% and 65.5% respectively of the 113 ordinary members. 70 members (62%) responded to both parts although it is noted some did not complete all questions. As responses to each section was voluntary, the number of responses relating to the section's analysis is noted against the tables and figures in this report.

In reviewing the 2015 findings, comparisons have been made with the results of surveys conducted in 2009, 2011 and 2013 to identify emerging trends and industry changes overtime.

Findings

- Almost two thirds (62.6%) of respondents manage venues with total capacities of between 261 and 1100 seats. A further 29% fall into the 1101 to 3000 seating capacity range. Less than 5% of centres had a seating capacity of below 260 and 4.8% of venues reported multiple spaces with a total of greater than 3000 capacity.

- 78.3% of all respondent centres are owned by Local Government, which also directly manages 66.3% of these centres. This equates to about two thirds of the entire sample being owned and operated by Local Government.

- Management models fall into six categories with 24.1% operating at arms-length from Government owners and 6% owned and operated as part of an educational institution.

- Between 2009 and 2015, venues managed by a separate legal entity has decreased by 9.9% with an increase by 8.3% of venues now directly managed as a business unit.

- Of the total respondents, 39.8% operate a performing arts centre with only one performance space. 73.5% operate either one or two performance spaces. Centres with four or more venues make up 12% of the sample.

- 50 respondents supplied complete financial information resulting in a combined turnover of $211.8 million. Individual respondent turnover ranged from $716,500 to $79.3 million.

- Financial data from 12 venues operating at arms length from the Government owner of their building represent 60.3% of the total income and 59.2% of the total expenditure. These venues also receive 49.4% of total funding support from local, state or federal government sources and 86.7% of the total private funding support.

- Turnover was found to maximise for venues with three performance spaces. As with previous surveys, no discernible relationship was perceived between turnover and distance from the nearest capital city.

- Government subsidy represents approximately one third of all income (34.3%). Respondents' entrepreneurial program (Box Office) reduced marginally at 13.3% from 13.8% in 2013, which was an increase against 12%, reported in 2011.

- Venue Hire increased to 10.3% when compared with 2013 (9.8%) while income from Food and Beverage almost doubled from 6.1% in 2013 to 11.9% in 2015, Recoverables increased from 8.2% to 13.3% and Ticketing Services from 6.1% to 9.3%.

- The predominant expense for centres remains labour at 41.4%, a reduction from 44.4% in 2013.

- Respondents spent just over $33.5million purchasing and presenting their programs, with another $9.4million spent on marketing these events and their venues.

- Local Government still represents the most significant government contributor with respondents reporting $57.4million or a consistent 78.9% (78.9% reported in 2013).

- $29.2 million in capital funding was received for projects conducted by 40 venues. 8 venues reported that almost 30% of the combined capital funding came from alternative sources to the three levels of Government.

- The average utilisation rate for all performance spaces is up to 59% from 58% in 2013 and the average utilisation rate for primary performance space has been maintained at 59% (down from 61% in 2011).

- As cultural hubs in their respective communities, performing arts centres host a range of both arts and community events. More than 9.1million people attended over 36,000 events of some kind at the respondents' venues.

- In 2015, 33% of arts centre activities were determined as non-arts events (down from 34% in 2015 and 37% in 2011), which demonstrates the importance of performing arts venues as a resource for each community that fulfils a variety of needs that are not necessarily arts related.

- 52.2% of respondents' venue usage is attributed to community events referring to events produced by amateur groups, dance schools etc. (See Appendix 1 for definitions). This represents a significant decrease from 65% in 2013 and 55% in 2011.

- Commercial performances has significantly increased from 35% to 47.8% providing evidence that venues are being required to increase earned income as funding conditions tighten.

- Seasons presented or co-presented by the respondents [that is where there is a financial risk to the presenter] make up 48% of the total performances presented.

- Of the total seasons on which respondents incurred full or part financial risk, Playing Australia supported 15%, a reduction from 21% in 2013. This represents 4.6% of all performing arts performances in the respondents' venues.

- State based funding provides 14% of the support for venues to present their entrepreneurial programming.

- Performances presented or co-presented by the respondents make up 48% of the total performances presented. This is a further increase from 2013 levels (41%) and 2011 levels (37%) and continues to demonstrate the growing trend towards entrepreneurial programming.

- 30 venues operate with a dedicated programming budget representing an investment in entrepreneurial activities of approximately $8.5 million annually.

- 70% of venues (n=30) reporting they were able to budget for a net loss annually on their programming budget, also reported either an annual surplus or breakeven result in their overall operating result from all venue activities.

- Of the respondents reporting on how an annual surplus is treated (n=33), 18 (54.5%) stated that they were able to retain this amount within their operations.

Conclusions

The respondents represented a wide range of performing arts centres, both in geographical spread from capital city to remote and in the size of enterprise, demonstrating the breadth of the APACA membership across Australia.
Local government remains at the centre of the sector, playing a most significant role in the management and operational funding of performing arts centres. Arms length management is preferred for larger enterprises particularly those funded through State and Territory Governments.

Performing arts centres are increasingly taking on greater risk in order to earn additional income and are looking to alternative funding sources, particularly to support their capital requirements and new infrastructure projects. Venues continue to be important community resources, with high levels of subsidised community and non-arts related activity undertaken within these facilities.

Playing Australia funds continue to deliver a proportion of seasons into venues, and remains an integral aspect of venue's entrepreneurial programs. Performing arts centres are also taking more risk in their programming reflecting the importance of self presented program activity, which delivers significant, economic and arts activity in the respondents' individual communities.

Playing Australia funds are catalysts for programming, in turn stimulating a significant percentage of employment expenditure of $85.7 million annually in the community in addition to the work generated through artists' fees with the $22 million invested in touring productions. Playing Australia alongside each State's touring funding programs are essential in the activation of national touring particularly for venues located in regional and remote communities. The respondent venues invested an additional $20.9 million in presenting and marketing events supported by Playing Australia.

Venues are highly valued in their community as the central focus for arts and entertainment access for audiences and generate employment opportunities for artists, venue workers and for the supporting industries in hospitality directly reported in this survey. The on-going impact where APACA members operate is shown to be excelling with the return on investment generating artistic, social and economic benefits for communities.

INTRODUCTION

The Australian Performing Arts Centres' Association (APACA) represents 190 organisations throughout Australia. 63% of these members operate a professionally managed performing arts centres. Other members (37%) are from organisations that have substantially similar objectives to the Association and include producing companies, touring organisations and funding bodies. Our members operate predominantly in the subsidised sector. There are four international members.

The performing arts centres' sector presents productions from a vast array of art forms from plays, opera and classical music, to comedy, circus and contemporary dance. Typically the sector operates with a limited resource base in service of delivering benefits to their community. Whilst members are geographically dispersed, technology facilitates regular communication that has developed the sector into a strong network.

AIM

The purpose of this survey and report is twofold. In the first instance, it is to provide members with comparative data that will assist in decision-making. Secondly, the report will provide information regarding the scale of operations of the sector. Performing arts centres often work in isolation as a result of the relatively unique nature of the industry and their geographic location. Similarly, lean staff structures and resource limitations restrict the ability of organisations to undertake research to inform the management and operation of their organisations and provide an evidence base for decision-making.

The overall aim of this project was to measure the extent of operations and economic activity of performing arts centres across Australia.

METHODOLOGY

APACA undertook research into its members' economic activity for the first time in 2006, and again in 2009, 2011 and 2013. This is the fifth such survey. Primary research has been undertaken due to a lack of consistent, standardised and available secondary data. All iterations of the project have revealed an on-going problem in the agreement on common definitions of terms used within the industry. A glossary of how terms are used in respect of this research is provided at Appendix A. Each time this research is undertaken, APACA endeavours to further clarify usage, but there is still variations within the industry on the use and definition of terms.

A review was undertaken prior to commencing the survey design in an attempt to clarify terminology, maximise participation in order to provide a strong representation of the sector and ensure the information presented met member needs. Based on feedback, the geographic disparity of respondents and the extent of variables to be considered in the survey, an online survey tool was considered most effective in achieving high response rates. The questionnaires were distributed over a period November to 2015 to January 2016 through Survey Monkey to Ordinary members only, i.e. those members who manage performing arts venues.

The survey tools can be found at Appendix B. Where possible, closed questions were asked requiring respondents to tick boxes or use drop down menus, however some questions required specific quantities and dollar values to be inserted by respondents. Conversely, for some questions it was important to provide an opportunity for respondents to clarify responses and opportunities for general comments were given. Not only did the questionnaires enable accurate collation of data, but also provided valuable insight for developing subsequent surveys.

Response Rates

There were 83 responses to Part 1 and 74 responses to Part 2 representing 73.5% and 65.5% respectively of the 113 ordinary members. 4 ordinary members are venue associations in their respective states and excluded from the data. 70 members (62%) responded to both parts although it is noted some did not complete all questions. As responses to each section was voluntary, the number of responses relating to the section's analysis is noted against the tables and figures in this report. Respondent numbers were slightly lower than in previous surveys however detailed data from a majority of the largest capital city centres is again notably absent from the respondent sample. This has affected data and analysis in various areas of the survey and will be discussed as needed.

In Figure 1, the percentage of respondents state by state against total responses is shown and compared with the percentage of total ordinary member venues per state. Both ACT venues responded to the survey registering a 100% response rate with the next highest response rate contributed by New South Wales with 86%. Most states averaged approximately 75% response rates from ordinary members operating venues providing a strong confidence level in the data result.

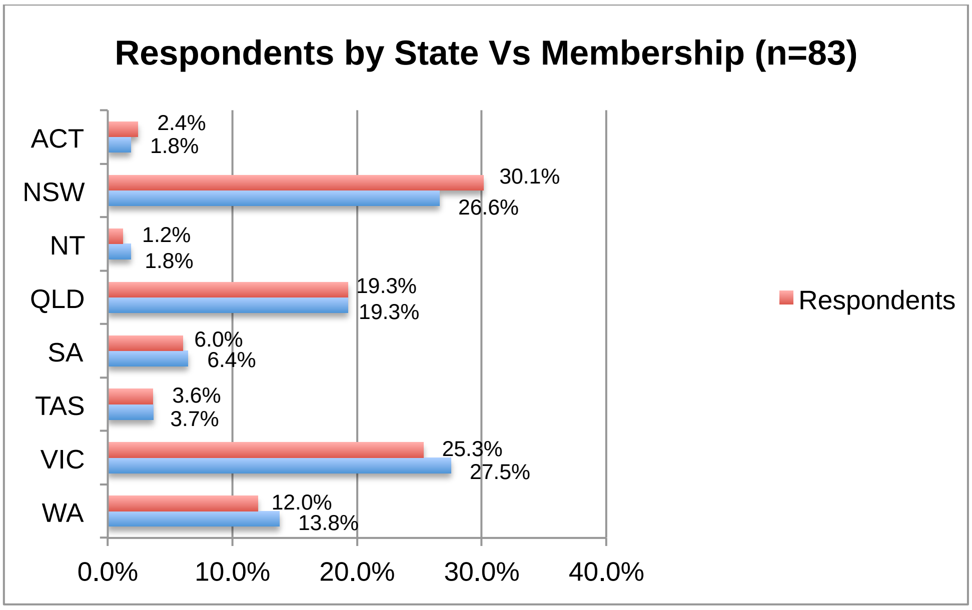

Figure 1: Respondents by State

FINDINGS

Respondents

The following venues listed in Table 1 responded to the survey:

State	Centre	Managed by	Population Serviced	Dist from Capital City (kms)	No. of Perf Spaces	Total Capacity	Annual Turnover	Annual Attendance
ACT	Canberra Theatre Centre	Stat Auth	900,000	-	3	1,954	9,008,931	219,716
	The Street Theatre	Contract Mgt	350,000	-	3	400	NA	NA
NSW	Albury Entertainment Centre	Local Govt	180,000	320	1	818	1,884,486	63,828
	Bathurst Memorial Entertainment Centre	Local Govt	42,000	200	2	1,642	1,790,579	47,791
	Capitol Theatre Tamworth	Local Govt	60,000	405	3	6,102	1,260,768	69,073
	Casula Powerhouse	Local Govt	190,000	40	1	326	NA	71,329
	Cessnock Community Performing Arts Centre	Local Govt	53,000	152	1	466	706,545	15,535
	City Recital Hall Angel Place	Company	4,293,000	-	1	1,238	NA	NA
	Coffs Harbour Jetty Memorial Theatre	Local Govt	75,000	300	1	249	NA	NA
	Dubbo Regional Theatre and Convention Centre	Local Govt	120,000	408	1	1,250	4,340,787	65,493
	Griffith Regional Theatre	Local Govt	55,000	575	1	523	1,189,413	24,080
	Hurstville Entertainment Centre	Local Govt	215,000	16	2	1,128	NA	137,233
	Illawarra Performing Arts Centre	Company	485,118	84	4+	801	3,705,683	130,846
	Joan Sutherland Performing Arts Centre	Company	500,000	55	3	1,288	3,418,069	224,505
	Laycock Street Com. Theatre	Local Govt	330,000	80	2	516	NA	NA
	Manning Entertainment Centre	Local Govt	95,000	310	1	505	721,071	26,843
	Monkey Baa Theatre Company	Company	4,293,000	-	1	380	NA	NA
	NIDA Parade Theatres	Educ Inst	100,000	10	4	1,260	NA	46,000
	NORPA, Northern Rivers Performing Arts	Company	240,000	200	2	750	NA	NA
	Orange Civic Theatre	Local Govt	100,000	255	1	502	2,111,945	44,990
	Queanbeyan Performing Arts Centre	Local Govt	443,409	10	1	346	NA	30,181
	Riverside Theatres Parramatta	Local Govt	200,000	26	3	1,062	5,199,616	160,673
	Seymour Centre	Educ Inst	4,293,000	2	4	1,704	3,938,997	203,905
	Shoalhaven Ent. Centre	Local Govt	120,000	160	2	1,100	1,914,903	54,223
	Sutherland Ent. Centre	Local Govt	280,000	23	3	1,165	1,913,939	151,477
	The Glasshouse Arts Conference and Ent. Centre	Local Govt	75,000	388	2	694	4,016,100	122,000
	Wagga Wagga Civic Theatre	Local Govt	120,000	453	1	491	NA	NA
NT	Darwin Entertainment Centre	Company	136,245	-	2	1,280	NA	87,867
QLD	Brisbane Powerhouse	Local Govt	2,100,000	3	3	875	10,745,799	NA
	Brolga Theatre	Local Govt	102,000	256	1	900	1,191,000	41,853
	Burdekin Theatre	Local Govt	20,000	1,200	3	1,612	738,393	96,000
	Cairns Civic Theatre	Local Govt	242,000	1,684	1	669	2,996,353	70,937
	Centre of Contemporary Arts Cairns	Bus Unit of Govt	160,285	1,684	1	250	NA	NA
	Empire Theatre	Company	250,000	125	4	2,297	4,842,495	118,711
	Gladstone Entertainment Centre	Local Govt	67,464	518	2	1,675	NA	NA
	Ipswich Civic Centre	Local Govt	195,000	39	2	921	NA	NA
	Judith Wright Centre of Contemporary Arts	Bus Unit of Govt	2,100,000	3	2	380	NA	NA

State	Centre	Managed by	Population Serviced	Dist from Capital City (kms)	No. of Perf Spaces	Total Capacity	Annual Turnover	Annual Attendance
QLD	Lake Kawana Community Centre	Local Govt	290,000	96	1	740	NA	86,636
	Logan Entertainment Centre	Local Govt	287,517	26	1	1,100	NA	NA
	Mackay Entertainment & Convention Centre	Local Govt	200,000	1,000	4+	3,000	NA	205,890
	Pilbeam Theatre	Local Govt	120,000	640	1	967	2,047,202	60,731
	Redland Performing Arts Centre	Local Govt	150,000	30	3	986	1,959,272	48,351
	The Events Centre	Company	300,000	95	2	1,540	2,943,465	92,129
	Townsville Civic Theatre	Local Govt	150,000	1,336	3	1,810	1,020,165	108,738
SA	Barossa Arts & Convention Centre	Educ Inst	40,000	70	2	1,155	1,089,807	23,813
	Golden Grove Arts Centre	Local Govt	98,000	25	1	329	NA	NA
	Marion Cultural Centre	Local Govt	85,000	13	1	280	NA	NA
	Murray Bridge Town Hall	Local Govt	15,000	80	1	300	NA	2,800
	The Hopgood Theatre	Stat Auth	180,000	30	2	612	513,428	37,989
TAS	Devonport Entertainment and Convention Centre	Local Govt	52,000	282	1	480	NA	NA
	The Burnie Arts and Function Centre	Local Govt	40,000	330	3	1,288	1,648,428	61,382
	Theatre Royal	Stat Auth	200,000	-	2	830	2,255,117	71,978
VIC	Arts Centre Melbourne	Stat Auth	4,880,000	-	4+	15,730	76,822,000	2,285,861
	Capitol Venues and Events	Local Govt	200,000	150	4	1,655	5,963,483	138,430
	Clocktower Centre	Local Govt	127,000	8	1	505	1,923,660	91,314
	Colac Otway Performing Arts and Cultural Centre	Local Govt	21,000	165	2	462	NA	16,099
	Darebin Arts and Entertainment Centre	Local Govt	300,000	11	4	885	NA	169,497
	Drum Theatre	Local Govt	750,000	35	1	521	NA	69,521
	Eastbank Centre - Riverlinks Venues	Local Govt	65,000	185	2	1,243	NA	NA
	Frankston Arts Centre	Local Govt	400,000	45	2	996	NA	165,949
	Geelong Performing Arts Centre	Stat Auth	290,000	75	3	2,655	NA	NA
	Hamilton Performing Arts Centre	Local Govt	16,000	295	3	800	NA	NA
	Her Majesty's Theatre	Local Govt	120,000	110	1	959	2,254,672	63,186
	Lighthouse Theatre	Local Govt	55,000	257	2	743		61,620
	Melbourne Recital Centre	Company	4,880,000	1	2	1,150	NA	NA
	Melbourne Theatre Company	Educ Inst	5,000,000	1	2	734	NA	128,069
	Mildura Arts Centre	Local Govt	51,373	400	2	544	1,494,619	67,300
	Portland Arts Centre	Local Govt	20,000	359	1	144	NA	NA
	Swan Hill Town Hall Performing Arts and Convention Centre	Local Govt	10,000	340	1	860	NA	NA
	The Cube Wodonga	Local Govt	120,000	320	1	410	NA	NA
	Wangaratta Performing Arts Centre	Local Govt	100,000	250	1	520	NA	48,895
	West Gippsland Arts Centre	Local Govt	65,000	100	2	650	NA	66,949
	Whitehorse Performing Arts Centre	Local Govt	163,697	15	1	414	NA	NA
WA	Arts Margaret River Margaret River Cultural Centre	Company	15,000	270	1	350	NA	20,000
	Broome Civic Centre [Shire of Broome]	Local Govt	17,000	2,230	2	400	329,645	20,000
	Bunbury Regional Entertainment Centre	Contract Mgt	100,000	170	2	1,050	NA	NA
	Carnarvon Civic Centre	Local Govt	5,000	910	2	700	NA	NA
	Esperance Civic Centre	Local Govt	14,500	720	3	1,750	533,948	NA
	His Majesty's Theatre	Bus Unit of Govt	2,020,000	2	2	1,384	NA	NA
	Mandurah Performing Arts Centre	Inc. Assoc.	250,000	75	2	921	2,347,403	170,147
	Matt Dann Theatre & Cinema	Local Govt	20,000	1,648	2	452	NA	NA
	Queens Park Theatre	Local Govt	40,000	460	2	1,073	NA	NA
	University Theatres - University of Western Australia	Educ Inst	2,020,000	-	4+	4,000	1,986,000	120,000

Table 1: List of Respondents NOTE: NA indicates information not provided or confidential

Capacity

Figure 2 shows that almost two thirds of the respondents (63%) manage performing arts centres which have a capacity of between 261 and 1100. The venue size parameters have been decided arbitrarily and are consistent with previous years' parameters.

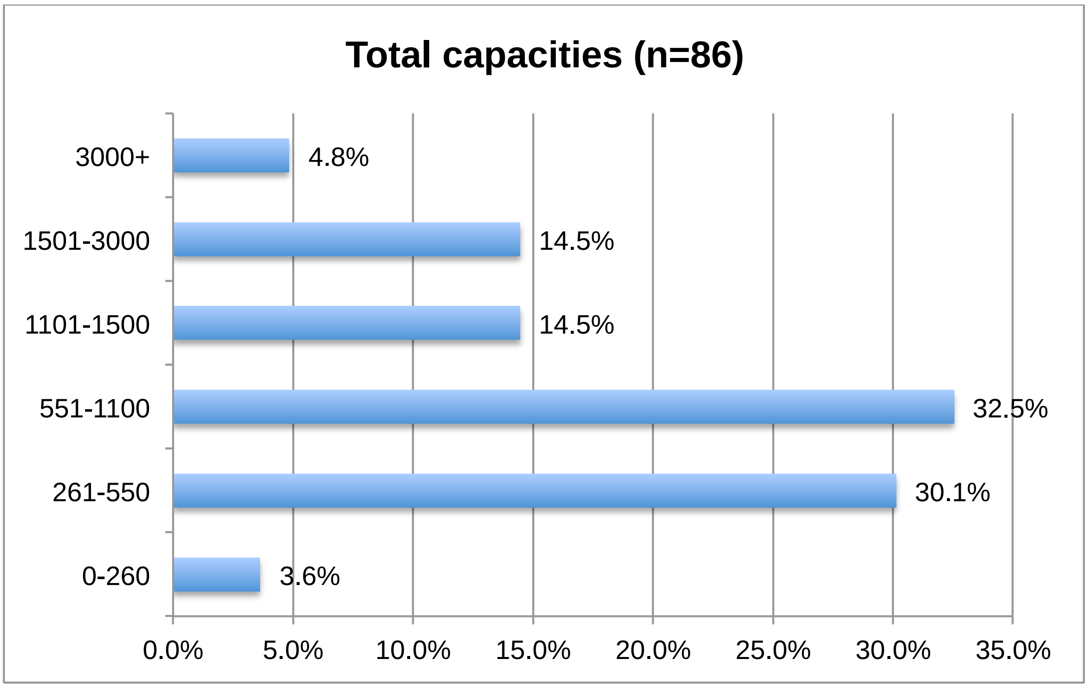

Figure 2: Distribution of Respondents by Seating Capacity

73.5% of respondents operate performing arts centres with either one or two performance spaces as show in Figure 3 below. Only 12% have four or more spaces.

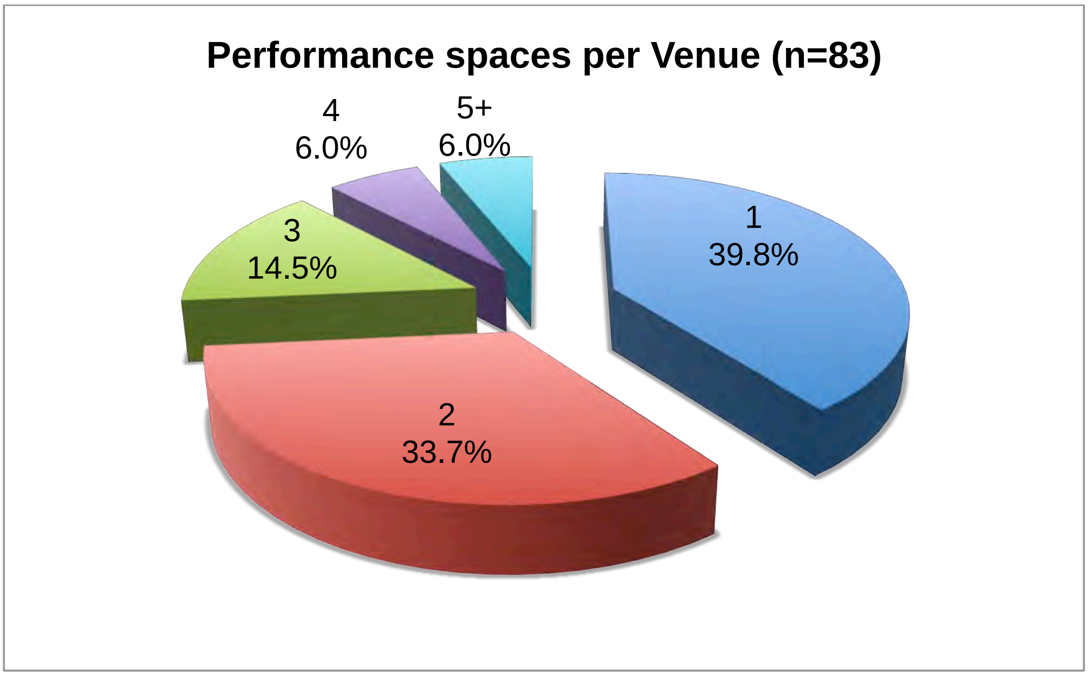

Figure 3: Performance Spaces

Figure 4 below shows that the majority of respondents' venues (66.3%) are managed directly by local government. In terms of ownership, local government's role is broader still (reaching 78.3%) as owners of the venues managed by separate legal entities. Two venue management entities recorded they maintain multiple contracts for management over venues owned by local government and respectively a state government agency and a private venue owner.

Results from APACA surveys over the past 8 years (2009, 2011, 2013 and the current 2015 results) shows a 9.9% decrease in venues that are managed by a separate legal entity (e.g.: Association, Statutory Authority or Company Limited by Guarantee) with an 8.3% increase in direct management of a business unit by the Government owner. This variation is presented with the understanding that each survey attracts a different mix of venues.

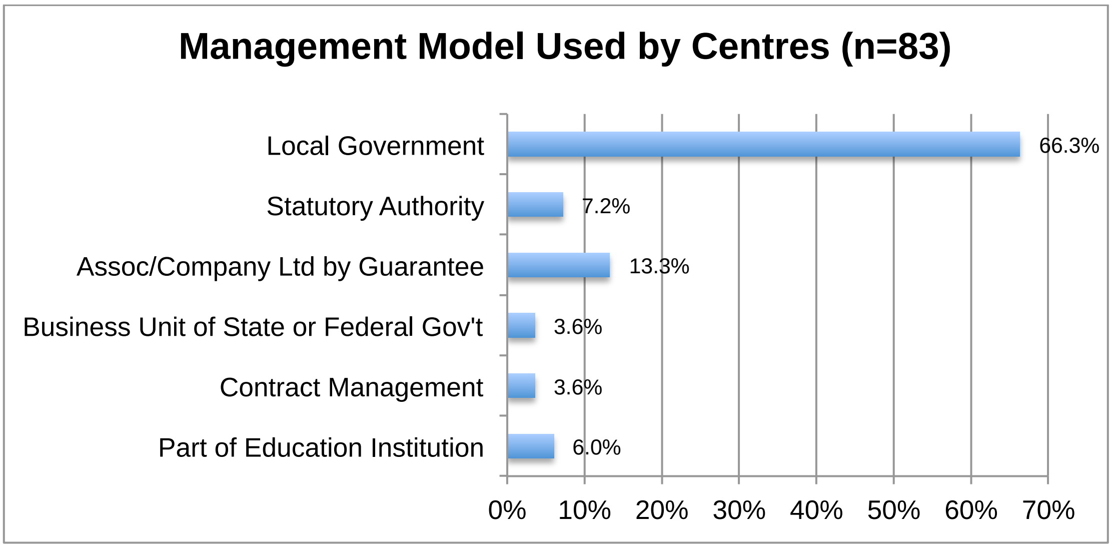

Figure 4: Management Models

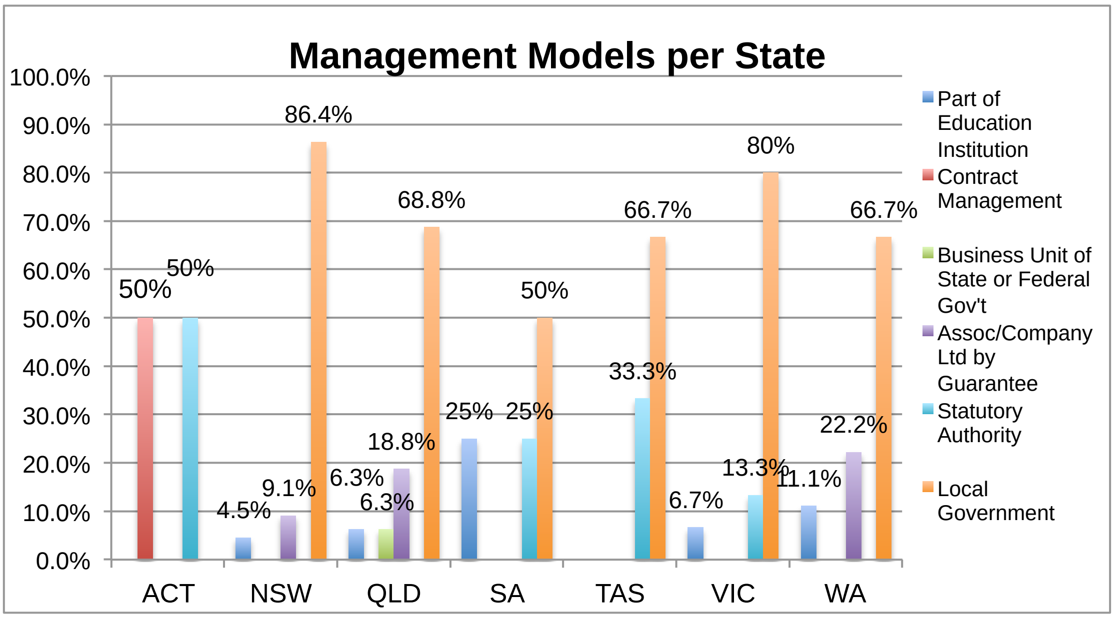

Figure 5: Management Models Used per State

Financial Snapshot

In order to understand the indicative scope of financial activity in the sector, respondents were asked to provide their last annual financial statement. Comprehensive and validated financial data was provided by a total of 50 respondent venues with a combined turnover of $211.7 million as shown in Table 2.

There are some difficulties in collating financial data in this form, as local government venues often show their operating deficit as an adjusted local government contribution under income, while those managed by separate legal entities have a final deficit or surplus that is taken up in their own separate balance sheets.

Of the 33 respondents reporting on how a surplus is treated, 18 (54.5%) of venues stated that they were able to retain this amount. The treatment of retained surplus varies with 10 venues reporting they are able to transfer amounts into a general purpose reserve, 4 are able to transfer to either a building, capital or programming reserve and 4 venues are able to add the surplus to the available funds for the following year.

The income generated from venue activities has increased from results of the 2013 survey but remains consistent with 2011 and 2009 results. Total funding from local government sources has substantially increased from 2009 at 9.7% to 2015 at 27.1% although the highest level of support was reported in 2013 at 34.8% of total income. Overall, government funding support has reduced by 10% in the last two years.

Table 2 shows that expenditure remains consistent with the 2011 and 2009 survey results. In 2013, the expenditure figures were reported as considerably lower than in previous surveys and the net surplus is considerably higher. Even with a lower number of participant venues (80 in 2013 and 50 in 2015), the inclusion of a number of larger city venues in the 2015 survey provides a significant increase in the volume of activities and a healthy net surplus.

Financial Overview (n=50)		
INCOME		**% of Total**
Box Office	$28,084,641	13.30%
Ticketing Services	$19,644,966	9.30%
Contract Performance Fees	$2,411,047	1.10%
Venue Hire	$21,711,688	10.30%
Recoverables	$28,120,491	13.30%
Food & Beverage	$25,244,643	11.90%
Merchandise	$580,296	0.30%
Interest	$1,252,559	0.60%
Other earned income	$4,040,509	1.90%
Sub-total Earned income	**$131,090,840**	***61.90%***
Federal Funding	$928,319	0.40%
State/Territory Funding	$14,446,696	6.80%
Local Govt Funding	$57,391,133	27.10%
Sub-total Funding	**$72,766,148**	***34.40%***
Philanthropic Trusts	$4,067,484	1.90%
Sponsorship (monetary)	$941,563	0.40%
Sponsorship (in-kind)	$1,160,285	0.50%
Donations/Fundraising	$1,619,997	0.80%
Non-government grants	$129,500	0.10%
Sub-total Private Support	**$7,918,829**	***3.70%***
TOTAL INCOME	**$211,775,818**	
EXPENDITURE		
Labour costs	$85,693,089	41.30%
Marketing/Promotions	$9,396,793	4.50%
Show Purchases	$21,992,734	10.60%
Program expenses	$11,480,642	5.50%
Food & Beverage costs	$20,389,327	9.80%
Administration	$17,483,510	8.40%
Repairs & Maintenance	$19,526,634	9.40%
Other Expenses	$21,418,700	10.30%
TOTAL EXPENDITURE	**$207,381,430**	
NET RESULT	**$4,394,388**	

Table 2: Financial Overview – All Venues

The following four tables provide a financial overview segmented into categories based on each venue's operational turnover annually. Table 3 provides the financial overview for venues in the category of up to $1 million in annual turnover. The eight venues included in this group each operate in a regional area and service communities with an average population of 85,000 people or less.

Financial Overview $0-$1M (n=8)		
INCOME		% of Total
Box Office	$689,572	12.25%
Ticketing Services	$475,875	8.45%
Contract Performance Fees	$0	-
Venue Hire	$976,184	17.34%
Recoverables	$584,872	10.39%
Food & Beverage	$153,967	2.73%
Merchandise	$20,930	0.37%
Interest	$2,981	0.05%
Other earned income	$40,991	0.73%
Sub-total Earned income	**$2,945,372**	52.31%
Federal Funding	$0	-
State/Territory Funding	$246,230	4.37%
Local Govt Funding	$2,431,494	43.18%
Sub-total Funding	**$2,677,724**	47.56%
Philanthropic Trusts	$0	-
Sponsorship (monetary)	$4,000	0.07%
Sponsorship (in-kind)	$3,000	0.05%
Donations/Fundraising	$418	0.01%
Non-government grants	$0	-
Sub-total Private Support	**$7,418**	0.13%
TOTAL INCOME	**$5,630,514**	
EXPENDITURE		
Labour costs	$2,761,844	45.33%
Marketing/Promotions	$217,201	3.56%
Show Purchases	$562,788	9.24%
Program expenses	$252,192	4.14%
Food & Beverage costs	$62,508	1.03%
Administration	$611,485	10.04%
Repairs & Maintenance	$229,271	3.76%
Other Expenses	$1,395,511	22.9%
TOTAL EXPENDITURE	**$6,092,800**	
NET RESULT	**-$462,286**	

Table 3: Financial Overview – Venues with Annual Turnover from $0 to $1 Million

The 19 venues included in this group have an annual turnover of between $1 million and $2 million. The majority operate in a regional area and three are small capacity venues located within a capital city. Excluding the capital city venues, the average size of the communities the remaining 16 venues service has a population base of approximately 100,000 people.

Financial Overview - Annual Turnover $1M-$2M (n=19)		
INCOME		% of Total
Box Office	$2,183,518	7.32%
Ticketing Services	$1,266,894	4.25%
Contract Performance Fees	$869,992	2.92%
Venue Hire	$3,254,223	10.91%
Recoverables	$3,811,818	12.78%
Food & Beverage	$2,860,311	9.59%
Merchandise	$36,577	0.12%
Interest	$0	-
Other earned income	$741,757	2.49%
Sub-total Earned income	**$15,025,091**	50.38%
Federal Funding	$654,359	2.19%
State/Territory Funding	$1,640,958	5.50%
Local Govt Funding	$12,417,763	41.64%
Sub-total Funding	**$14,713,080**	49.33%
Philanthropic Trusts	$0	-
Sponsorship (monetary)	$72,203	0.24%
Sponsorship (in-kind)	$10,000	0.03%
Donations/Fundraising	$2,755	0.01%
Non-government grants	$0	-
Sub-total Private Support	**$84,958**	0.28%
TOTAL INCOME	**$29,823,129**	
EXPENDITURE		
Labour costs	$13,558,164	46.16%
Marketing/Promotions	$902,222	3.07%
Show Purchases	$1,902,699	6.48%
Program expenses	$1,023,179	3.48%
Food & Beverage costs	$1,425,906	4.85%
Administration	$2,240,407	7.63%
Repairs & Maintenance	$1,474,637	5.02%
Other Expenses	$6,843,263	23.3%
TOTAL EXPENDITURE	**$29,370,477**	
NET RESULT	**$452,652**	

Table 4: Financial Overview – Venues with Annual Turnover from $1 Million to $2 Million

The 17 venues included in the Table 5 group have an annual turnover of between $2 million and $5 million. With one exception, these venues operate in regional areas with populations above 200,000 people on average. 47% are operated by a management entity at arms-length from the venue owner. Local Government owns 76.5% in this group of venues.

Financial Overview - Annual Turnover $2M-$5M (n=17)		
INCOME		% of Total
Box Office	$8,634,374	15.68%
Ticketing Services	$4,019,105	7.3%
Contract Performance Fees	$295,014	0.54%
Venue Hire	$6,388,811	11.6%
Recoverables	$6,618,157	12.02%
Food & Beverage	$4,334,757	7.87%
Merchandise	$198,919	0.36%
Interest	$240,042	0.44%
Other earned income	$1,583,523	2.88%
Sub-total Earned income	**$32,312,702**	58.69%
Federal Funding	$216,109	0.39%
State/Territory Funding	$3,258,114	5.92%
Local Govt Funding	$17,570,556	31.91%
Sub-total Funding	**$21,044,779**	38.22%
Philanthropic Trusts	$127,500	0.23%
Sponsorship (monetary)	$347,588	0.63%
Sponsorship (in-kind)	$57,000	0.1%
Donations/Fundraising	$1,150,944	2.09%
Non-government grants	$17,500	0.03%
Sub-total Private Support	**$1,700,532**	3.09%
TOTAL INCOME	**$55,058,013**	
EXPENDITURE		
Labour costs	$24,275,181	44.9%
Marketing/Promotions	$2,696,205	4.99%
Show Purchases	$4,835,482	8.94%
Program expenses	$2,653,533	4.91%
Food & Beverage costs	$2,732,332	5.05%
Administration	$6,082,022	11.25%
Repairs & Maintenance	$2,283,028	4.22%
Other Expenses	$8,504,956	15.73%
TOTAL EXPENDITURE	**$54,062,739**	
NET RESULT	**$995,274**	

Table 5: Financial Overview – Venues with Annual Turnover from $2 Million to $5 Million

Table 6 provides the financial overview of five venues with an annual turnover above $5 million and less than $12 million, three of these venues are operating within a city environment. For this financial overview, one major city venue that provided data in the survey was excluded as its turnover is well above $15 million which would skew the combined figures.

Financial Overview - Annual Turnover $5M-$12M (n=5)		
INCOME		% age of Total
Box Office	$8,348,177	19.89%
Ticketing Services	$6,564,092	15.64%
Contract Performance Fees	$12,041	0.03%
Venue Hire	$3,618,470	8.62%
Recoverables	$2,739,643	6.53%
Food & Beverage	$3,745,608	8.93%
Merchandise	$323,869	0.77%
Interest	$169,536	0.4%
Other earned income	$1,674,239	3.99%
Sub-total Earned income	**$27,195,676**	64.81%
Federal Funding	$57,851	0.14%
State/Territory Funding	$2,301,394	5.48%
Local Govt Funding	$10,237,320	24.4%
Sub-total Funding	**$12,596,565**	30.02%
Philanthropic Trusts	$97,984	0.23%
Sponsorship (monetary)	$517,772	1.23%
Sponsorship (in-kind)	$1,090,285	2.6%
Donations/Fundraising	$465,880	1.11%
Non-government grants	$0	-
Sub-total Private Support	**$2,171,921**	5.18%
TOTAL INCOME	**$41,964,162**	
EXPENDITURE		
Labour costs	$16,041,900	39.09%
Marketing/Promotions	$2,800,165	6.82%
Show Purchases	$4,093,765	9.98%
Program expenses	$6,015,738	14.66%
Food & Beverage costs	$4,024,581	9.81%
Administration	$4,366,597	10.64%
Repairs & Maintenance	$2,297,699	5.60%
Other Expenses	$1,392,969	3.39%
TOTAL EXPENDITURE	**$41,033,414**	
NET RESULT	**$930,748**	

Table 6: Financial Overview – Venues with Annual Turnover from $5 Million to $12 Million

Of the total of 50 venues providing full financial data, 38 venue respondents reported operating within either a Local or State Government environment as a Business Unit or within a University department and are generally working with budgets requiring a breakeven result at the end of the financial year. Table 7 provides a financial overview of their data.

57% of these venues provided data showing the subsidy received is equal to the total income earned less expenses giving a zero end of year result. 23% of these venues showed an operating surplus while 20% showed a deficit in their yearly operational result.

Financial Overview - Venues managed within Government (n=38)		
INCOME		% age of Total
Box Office	$10,885,299	14.01%
Ticketing Services	$7,950,097	10.23%
Contract Performance Fees	$1,053,893	1.36%
Venue Hire	$9,116,967	11.73%
Recoverables	$8,028,926	10.33%
Food & Beverage	$6,627,102	8.53%
Merchandise	$450,217	0.58%
Interest	$3,977	0.01%
Other earned income	$2,102,179	2.7%
Sub-total Earned income	**$46,218,657**	59.47%
Federal Funding	$833,220	1.07%
State/Territory Funding	$2,215,582	2.85%
Local Govt Funding	$33,810,532	43.5%
Sub-total Funding	**$36,859,334**	47.43%
Philanthropic Trusts	$185,484	0.24%
Sponsorship (monetary)	$370,412	0.48%
Sponsorship (in-kind)	$50,900	0.07%
Donations/Fundraising	$442,118	0.57%
Non-government grants	$-	0.00%
Sub-total Private Support	**$1,048,914**	1.35%
TOTAL INCOME	**$84,126,906**	
EXPENDITURE		
Labour costs	$35,444,424	45.64%
Marketing/Promotions	$3,456,681	4.45%
Show Purchases	$7,646,638	9.85%
Program expenses	$6,329,970	8.15%
Food & Beverage costs	$5,139,142	6.62%
Administration	$7,140,889	9.19%
Repairs & Maintenance	$4,105,939	5.29%
Other Expenses	$15,413,638	19.85%
TOTAL EXPENDITURE	**$84,677,322**	
NET RESULT	**$-550,416**	

Table 7: Financial Overview - Venues managed within Government or University environments

Table 8 isolates the data contributed by 12 venues reporting their management as being at arms length from the Government owner of their building. Five of these venues report their management model as a Statutory Authority and five operate through a Company Limited by Guarantee owned by their Local Government authority. Five of these venues are located in a capital city and seven are within 150 kilometres of their nearest capital city.

Their data when compared with the results in Table 2 shows they represent 60.3% of the total income and 59.2% of the total expenditure. These venues also receive 49.4% of total funding support from Local, State or Federal government sources to Table 2 and 86.7% of the total private funding support.

Financial Overview - Venues managed by a Separate Entity (n=12)		
INCOME		% age of Total
Box Office	$17,199,342	12.83%
Ticketing Services	$11,694,869	8.72%
Contract Performance Fees	$1,357,154	1.01%
Venue Hire	$12,594,721	9.40%
Recoverables	$20,091,565	14.99%
Food & Beverage	$18,617,541	13.89%
Merchandise	$130,079	0.1%
Interest	$1,248,582	0.93%
Other earned income	$1,938,330	1.45%
Sub-total Earned income	**$84,872,183**	63.31%
Federal Funding	$95,099	0.07%
State/Territory Funding	$12,231,114	9.12%
Local Govt Funding	$23,580,601	17.59%
Sub-total Funding	**$35,906,814**	26.78%
Philanthropic Trusts	$3,882,000	2.90%
Sponsorship (monetary)	$571,151	0.43%
Sponsorship (in-kind)	$1,109,385	0.83%
Donations/Fundraising	$1,177,879	0.88%
Non-government grants	$129,500	0.1%
Sub-total Private Support	**$6,869,915**	5.12%
TOTAL INCOME	**$127,648,912**	
EXPENDITURE		
Labour costs	$50,248,665	21.83%
Marketing/Promotions	$5,940,112	2.58%
Show Purchases	$14,346,096	6.23%
Program expenses	$5,150,672	2.24%
Food & Beverage costs	$15,250,185	6.63%
Administration	$10,342,621	4.49%
Repairs & Maintenance	$15,420,695	6.7%
Other Expenses	$6,005,062	2.61%
TOTAL EXPENDITURE	**$122,704,108**	
NET RESULT	**$4,944,804**	

Table 8: Financial Overview – Venues managed by Separate Entity

Turnover

Turnover ranged from $716,500 to $79.3 million, a wider range that the 2013 survey but consistent with data reported in the 2011 survey (Figure 6).

Venues with less than 260 seats did not respond to the 2015 survey while large venues with multiple spaces provided a new category of 3000 or more seats. The extremities of the range are higher than in previous surveys, mostly due to the inclusion of high capital city arts centres.

The following figures required collated data from both Parts 1 and 2 of the survey and, as such, have a low number of respondents (n=48). To ensure consistency with previous survey results and prevent skew, one large, capital city centre operating multiple large spaces has been omitted from this particular data.

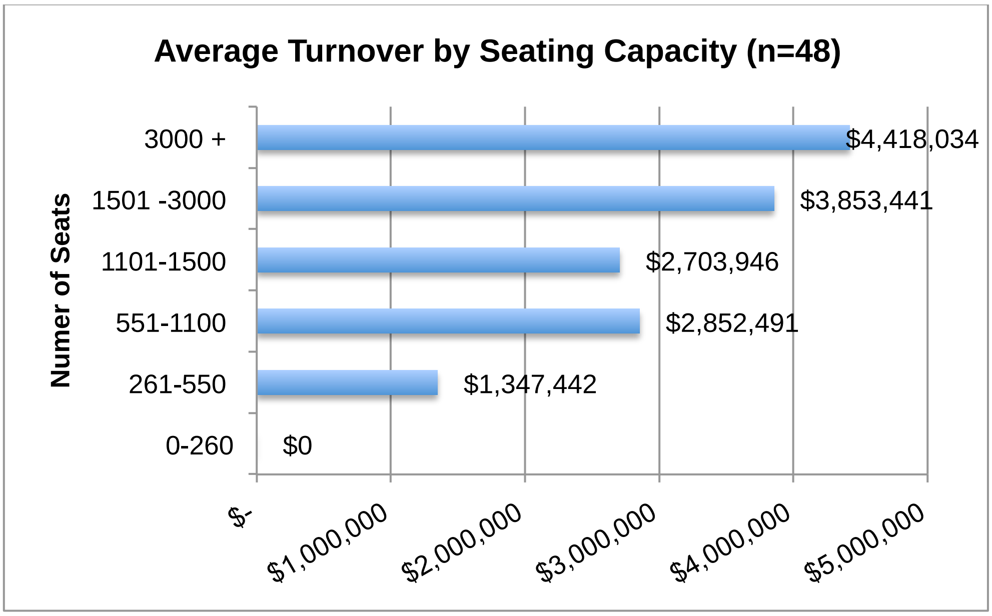

Figure 6: Average Turnover by Seating Capacity

Figure 6 above shows a higher turnover for all categories excepting venues with three performance spaces when compared with the 2013 survey. An additional five or more spaces category has been included for this survey. Again, one major city venue was excluded as the 5+ spaces category was significantly skewed by an average of $3.7 million to over $22 million turnover.

In the group of 10 venues with three spaces, 50% are venues with less than 500 seats providing an average turnover result approximately $800,000 less than in 2013 (although the average $2.8 million is consistent with 2011 and 2009 results).

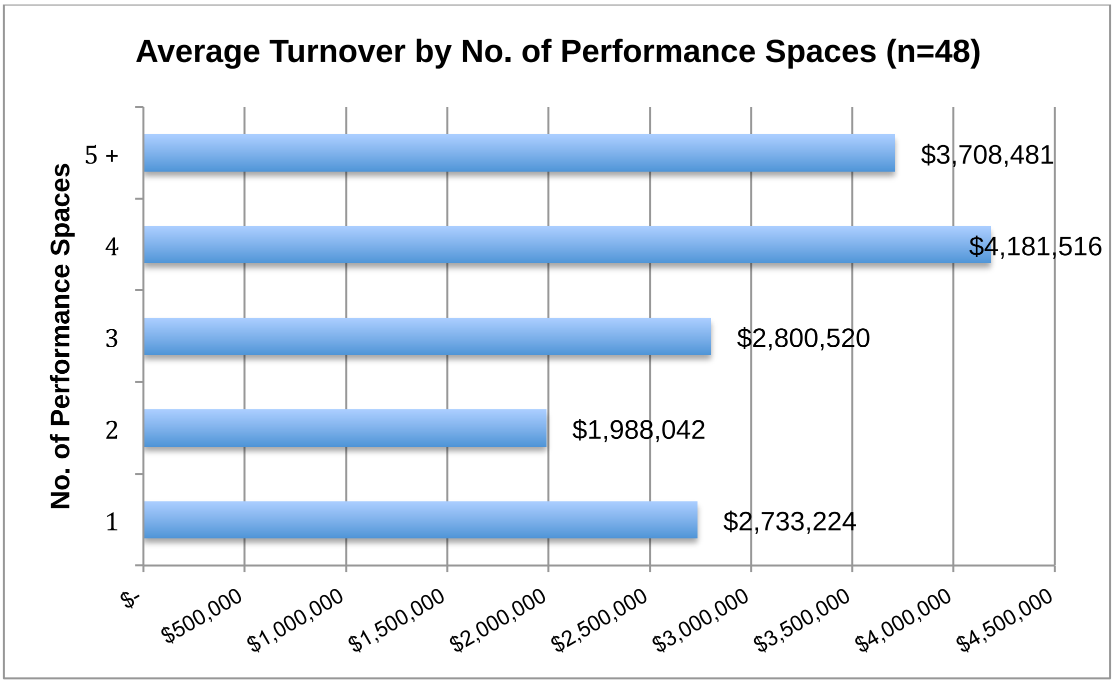

Figure 7: Average Turnover by No. of Performance Spaces

Figure 8 shows the effect on turnover of a centre's distance from the nearest capital city. While it displays no obvious trend as such, it does suggest that there are certain "sweet spots" geographically. One major capital city venue is not included in the grouping of city and metropolitan venues within 10 kilometres of the city centre as inclusion of this data skews the average turnover from $4.6 million to over $23 million. Respondents operating venues furthest from a capital city are located in larger populated areas in north Queensland and the north of Western Australia.

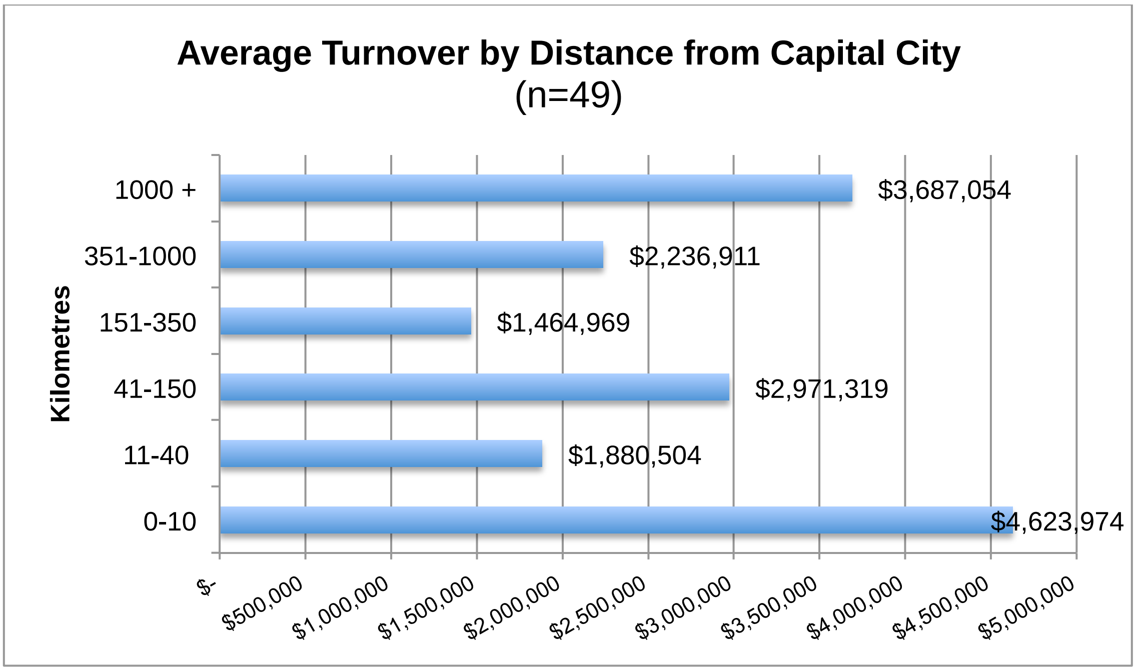

Figure 8: Average Turnover by Distance from the Nearest Capital City

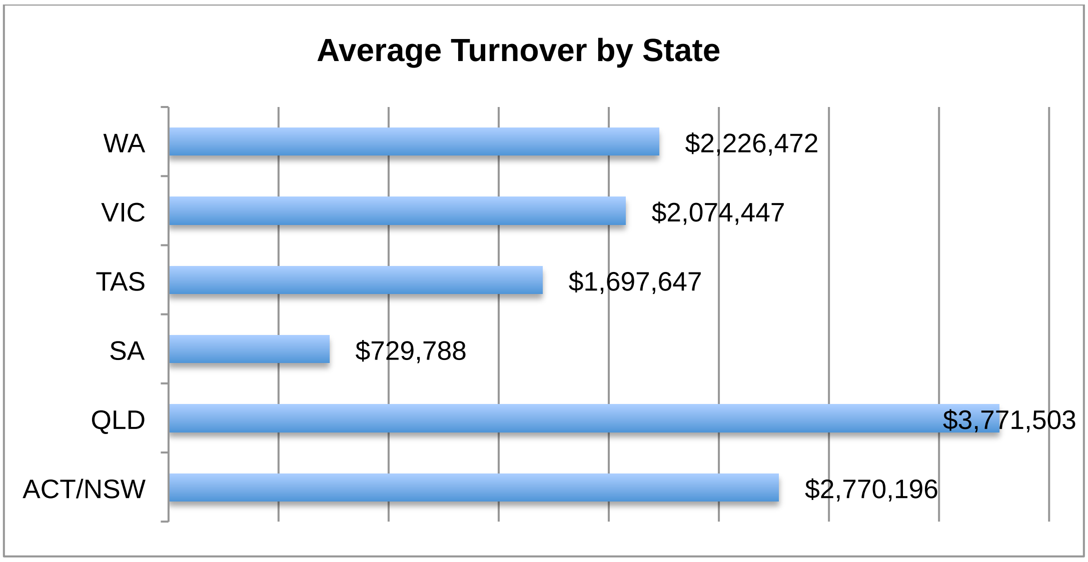

Figure 9: Average Turnover by State (note: a major city venue excluded from data above)

Local Government subsidy represents the largest source of income at just under one third (27.1%) of all revenue. This percentage has reduced since 2013 where Local Government provided 34.8% of all revenue.

Income from venues' entrepreneurial program has changed marginally from 2013 figures (Box Office from 13.7% to 13.3% and Venue Hire from 9.8% to 10.3%). In the 2013 survey, Food and Beverage income decreased to 6.1% (from 12.1% in 2011) and Ticketing Services dropped to 6.1% (8.4% in 2011). The 2015 survey shows both categories have returned to 2011 levels at 11.9% income from Food and Beverage and 9.3% for the provision of Ticketing Services.

Income from monetary categories of private support (Philanthropic Trusts, Sponsorship and Donations/Fundraising) has increased by almost 1%. This increase represents $3.5 million that can be attributed in its entirety to the inclusion of the one major capital city venue. By excluding this venue, private support for venues has decreased by approximately $500,000 since 2013.

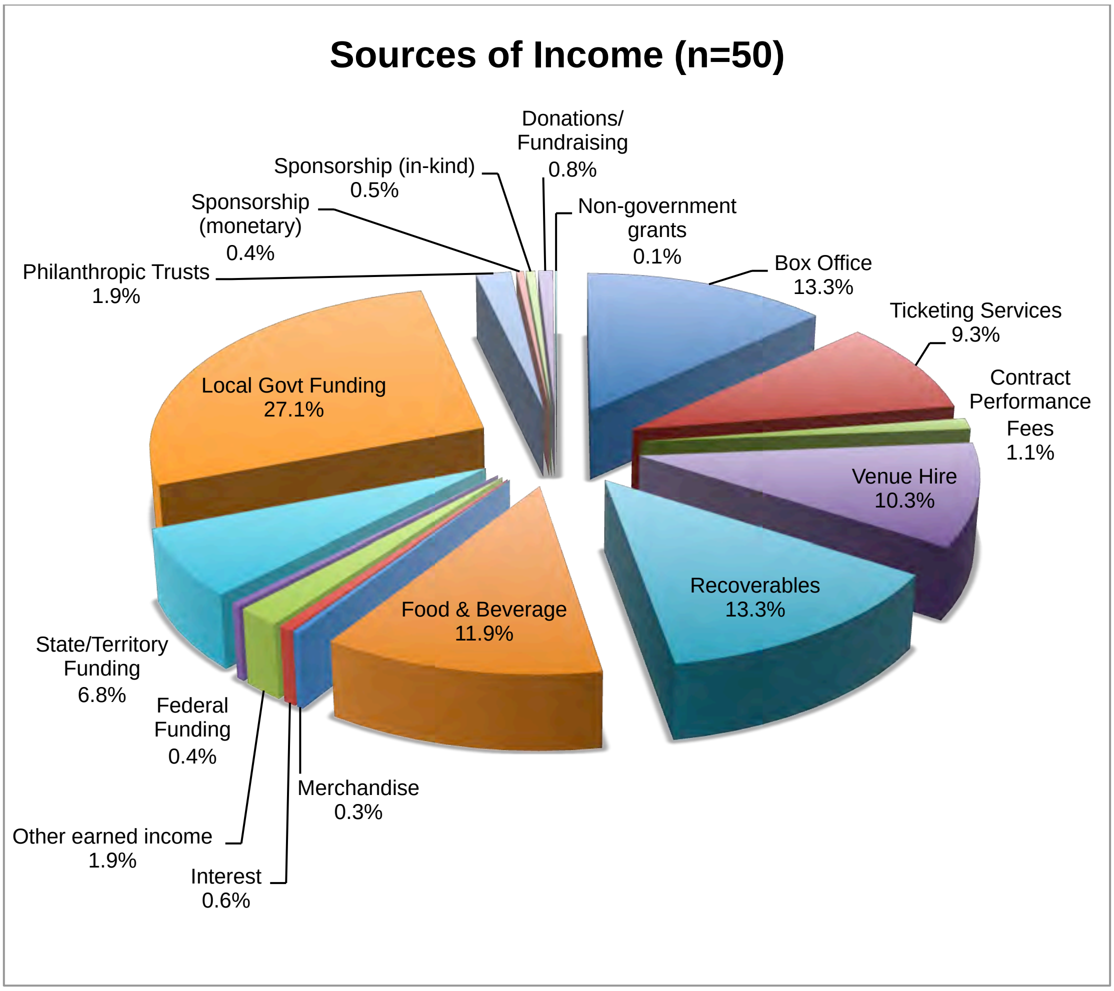

Figure 10: Sources of Income

Expenses

Labour costs remain the largest expense for respondents (41.4%) representing $85.7M in employment for the sector. Employment also benefits from a reported doubling of food and beverage costs from $5.5M in 2013 to $20.4M in 2015.

Expenditure on entrepreneurial programming (show purchases 10.6% and program expenditure 5.5%) is slightly lower than in 2013 (17.1% combined) although still higher than in 2009 (13% combined) and 2011 (15.8% combined).

Respondents spent just under $22M purchasing and presenting their programs, with another $9.3M spent on marketing these events and their venues. Both these figures are higher than the 2013 survey's figures of $12.9M and $7M respectively, although compare well with the 2011 results showing $24M for purchase and presentation of programs and $8.2M for marketing.

Repairs and Maintenance also shows a significant increase since 2013 moving from 4.4% to 9.4% although as shown in Tables 3 and 4, much of the increase can be attributed to the inclusion of one major capital city venue.

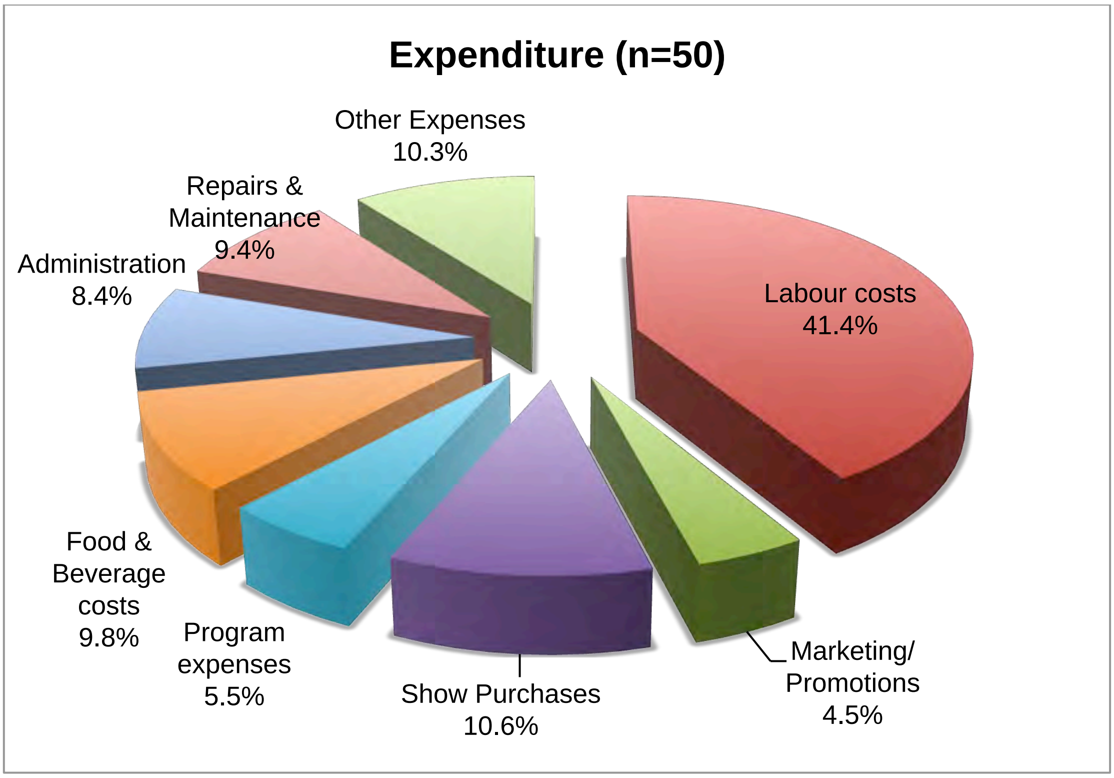

Figure 11: Expenditure Breakdown

Funding

Figure 12 represents the breakdown of total operational government funding received by respondents. It shows Federal Government Funding has remained static at 1.3% and State/Territory Funding has shown 0.1% increase from 19.8% in 2013. However, by excluding the one major capital city venue that receives significant funding from its State Government agency, the percentage of State/Territory Funding received by the remaining 49 venues across Australia shows a reduction by 5.26% from 2013 results. Local Government remains the largest contributor at $57.4 million.

48 respondents provided the total value of the contribution made by their primary source of operational subsidy including the total value of their Community Service Obligation (CSO). Approximately one quarter of these venues also recognised the value of services such as business support in accounting or IT services provided by their parent organisation. The total value reported is just over $75 million.

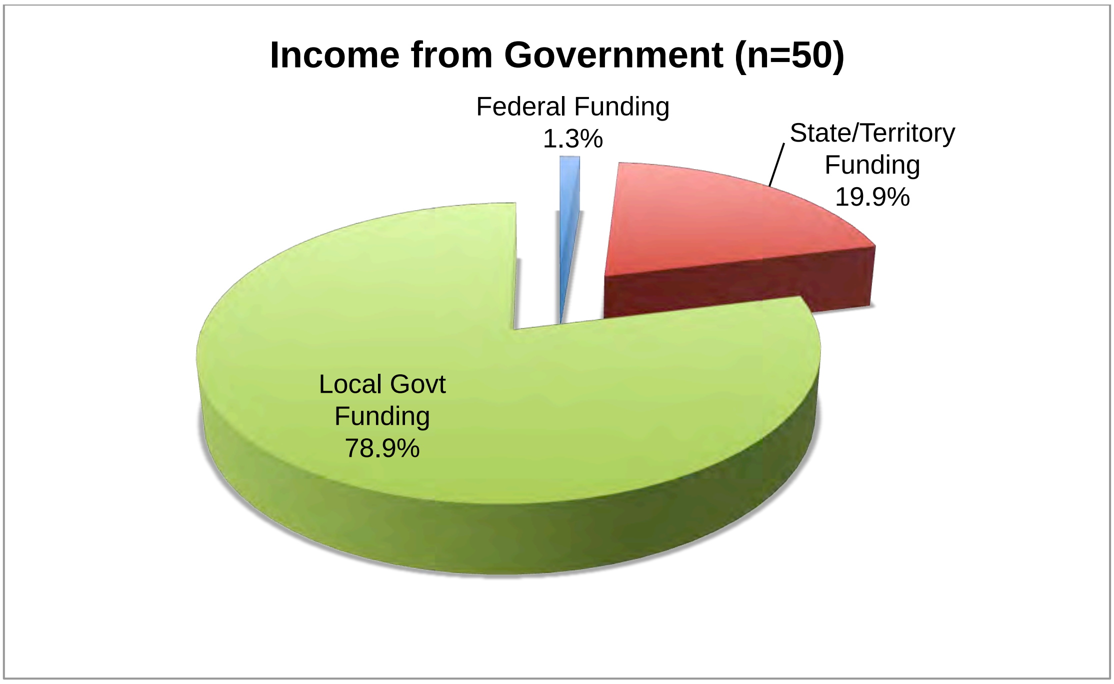

Figure 12: Total Income from Government

The breakdown of funding sources for capital expenditure is shown at Figure 13. At 24.2% Federal funding is higher than in previous surveys (17.2% in 2013 and 11% in 2011) although it should be noted this result includes a one-off grant towards a major regional centre's building project that attracted a total $29.2M contribution across all three levels of government. Local Government funding towards Capital projects shows a considerably lower comparative percentage than previous reports mainly due to the inclusion of reported funding from other sources.

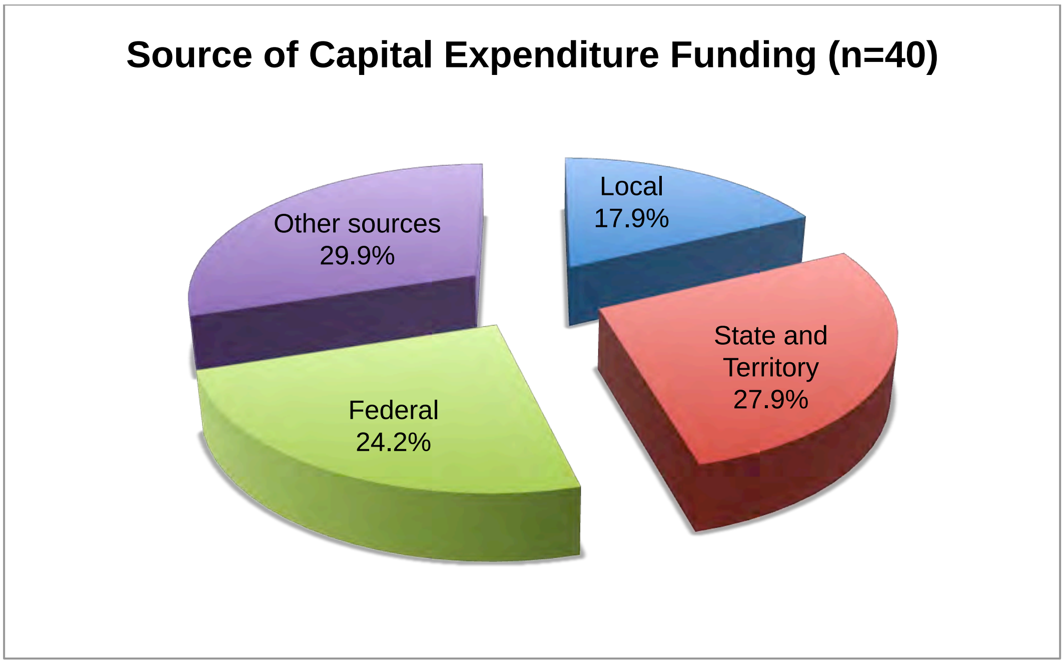

Figure 13: Sources of Capital Expenditure Funding

In 2015, eight venues reported attracting capital from other sources at 29.9% of the total, which changes the weighting of contributions by the three levels of government. This is a significant change over previous survey results that in 2011 reported other sources contributing 4% towards capital projects (nil was reported in 2013).

Figure 13 shows the comparison of Capital Funding sources between only Local, State/Territory and Federal sources over three surveys.

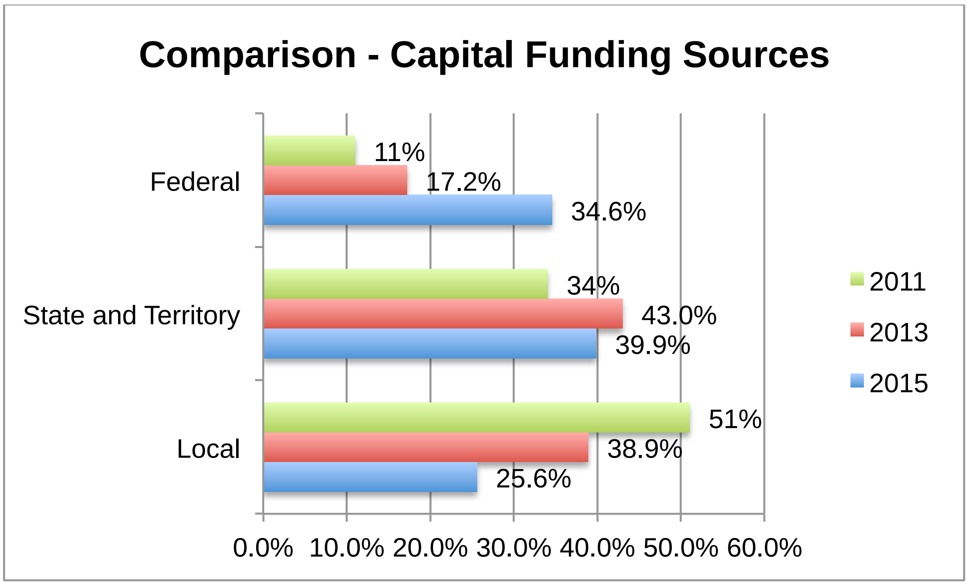

Figure 14: Comparison of Sources of Capital Expenditure Funding 2011 to 2015

Venue Utilisation

The average total utilisation rate for all spaces operated by 73 venues across Australia has increased by 0.1% (59% in 2015) over 2013 results (58% up from 54.7% in 2009). The average occupancy rate for the respondents' primary venue is also at 59%, equal to the 2013 survey rate although lower than in the 2011 survey (61%).

	Perf Space 1	Perf Space 2	Perf Space 3	Perf Space 4	Perf Space 5	All Spaces
Utilisation	59%	52%	59%	56%	64%	59%
Avg # Seats	654	334	407	300	207	
Avg # Days Available	313	315	299	254	188	314
Average # Days Unused	127	152	124	111	68	128
Number Sampled (n=)	82	50	21	10	4*	

Table 9: Venue Utilisation by Performance Spaces

** Data for performance spaces 5 calculates from a small a sample size*

The utilisation rate varies from state to state as shown in Table 10. The number of days annually available in each venue is rarely 365 days as in some venues, operational conditions and costs preclude uses on days such as public holidays or when a space is allocated to maintenance and equipment installation.

State	Average Utilisation%	Avg # Days Available	Avg # days Used	Sample size
ACT*	NA	NA	NA	1
NSW	58.3%	312	182	22
NT*	NA	NA	NA	1
QLD	59.4%	330	196	12
SA	54.9%	334	183	5
TAS	32.6%	287	94	3
VIC	67.1%	317	213	19
WA	64.1%	289	185	10

Table 10: Average Utilisation of all Spaces by State

** Data provided from the ACT and NT is excluded so as not to identify the one venue respondent.*

Activity Levels

As cultural hubs in their respective communities, performing arts centres host a range of both performing arts and community events. Table 11 demonstrates the respondents' overall level of venue activity.

While this survey samples an average of 60% of all APACA venue members, these results give an indication of the total volume of activity being undertaken. Significant numbers of people are attending performing arts centres in Australia, the sample venue members are attracting over $9.15 million attendances annually.

The number of performances presented by member venues has risen significantly over the past six years from 8,495 (n=72) in 2011 to 13,116 (n=76) in 2013 and in these results, has almost doubled to 24,425 (n=64). Approximately, 12% of the increase can be attributed to the inclusion of data belonging to one major capital city venue.

The total attendances at performances is also shown to have increased over time, with 64 respondents in 2009 attracting over 4.5 million people rising to almost 5 million in 2015. In 2009, three major capital city venues (The Arts Centre Melbourne, Sydney Opera House and the Queensland Performing Arts Centre) contributed to the data. The comparative 2015 results indicates increases in attendances at regional venues over the six-year period.

State	Total Perfs n=64	Total Attendance at Perfs n=66	Total all Activities n=68	Attendance at all Activities n=64	Total Non-Arts Activities n=64	%age Non-Arts Activities
ACT	144	207,578	155	219,716	11	7%
NSW	10,618	1,376,470	12,100	1,949,757	1,482	12%
NT	255	84,000	260	87,867	5	2%
QLD	2,283	598,777	5,008	1,114,890	2,725	54%
SA	404	28,759	834	94,996	430	52%
TAS	726	126,777	1,142	160,511	416	36%
VIC	8,363	2,223,077	14,452	3,903,976	6,089	42%
WA	1,632	348,809	2,333	1,616,950	701	30%
Total	24,425	4,994,247	36,284	9,148,663	11,859	33%

Table 11: Venue Activity Levels

Figure 15 shows that 32.7% of annual activity in the respondent venues was non-arts activities. The number of arts activities conducted in respondent venues annually has increased in 6 years from 63% in 2011, 66% in 2013 to 67.3% in 2015.

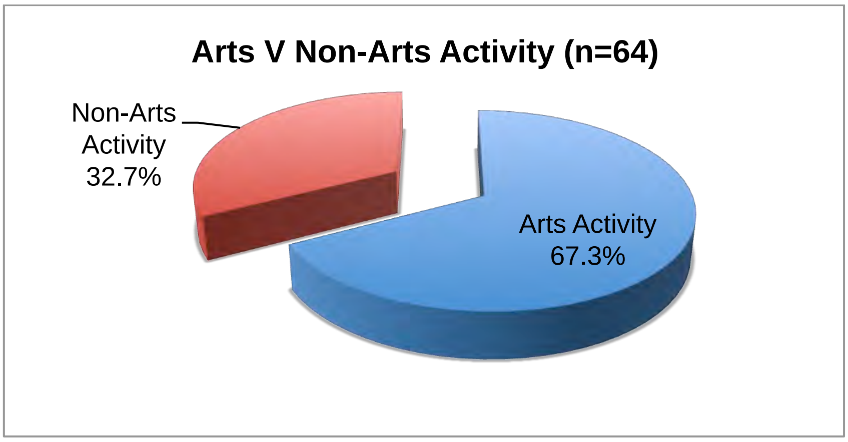

Figure 15: Activity Type

Community usage has decreased to 52.2% having risen to 65% in 2013, although the 2015 percentage is more consistent with a 55% result recorded in 2011. Community events are defined as activities produced by amateur performance groups, dance and drama school concerts, etc using the respondent venue for their presentations.

Most states excepting the Australian Capital Territory (ACT), Queensland (QLD) and South Australia (SA) show an increase in the number of community activities and overall, the level of community use has increased from 5,145 in 2013 to 5,362 in the 2015 survey results.

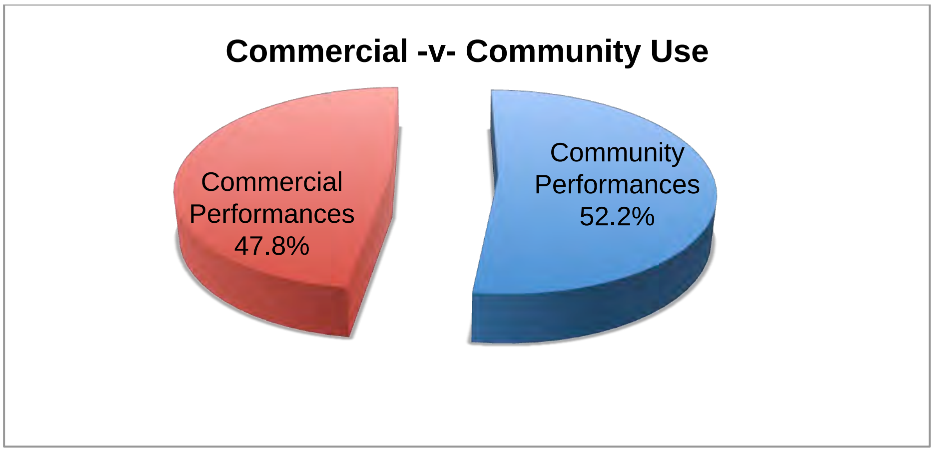

Figure 16: Community -v- Commercial Use

Table 12 shows a breakdown by state of community and commercial performances. Commercial use has seen a dramatic increase from 35% in 2013 to 47.8% in 2015. Queensland and South Australia show decreases in commercial activities while New South Wales (NSW), Tasmania (TAS) and Victoria (VIC) recorded significant increases taking total commercial activities from 2,980 in 2013 to 4,904 in 2015.

	Community Performances	Community Activities	Community as % age of total activities per state	Commercial Performances	Commercial Activities	Commercial as % age of total activities per state
	n=68			n=68		
ACT	113	14	11%	223	113	89%
NSW	2054	589	38%	1657	961	62%
NT	36	34	42%	47	47	58%
QLD	782	303	56.3%	345	235	43.7%
SA	146	84	79.2%	24	22	20.8%
TAS	93	23	21.3%	182	85	78.7%
VIC	1426	609	58.3%	2073	435	41.7%
WA	712	413	59.4%	353	282	40.6%
Total	5362	2069		4904	2180	

Table 12: Community -v- Commercial Performances and weighting of Activities per State

Programming

Of the 83 respondents to part 2 of the survey, 30 responded with data that allowed a study of dedicated programming budgets representing an investment in entrepreneurial activities of approximately $8.5 million annually.

70% of the venues reporting they were able to budget for a net loss annually on their programming budget, also reported either an annual surplus or breakeven result in their overall operating result from all venue activities.

Table 13 shows a breakdown of the performing arts events undertaken by respondents. Definitions of terms can be found at Appendix A. It should be noted that the number of productions supported by Playing Australia is a subset of the "Full Risk" and "Shared Risk" categories.

In comparison to the 2013 data, the number of entrepreneurial seasons presented by respondents has remained similar with an overall increase of 3%. This result is mainly due to a marked increase for both New South Wales and Tasmania in the number of seasons presented. All other states are reporting a reduction of entrepreneurial activities, five of them by up to 40%.

While the number of seasons remains similar, the number of entrepreneured performances within seasons is reducing with approximately 1,500 less presented in 2015 than reported in 2013. There is also a marginal increase in the number of seasons presented by Hirers of the respondent venues (from 3,252 to 3,378).

The number of Playing Australia supported seasons (339) is again down from 2013 (397), 2011 (411) and from the 2009 results (482) as are Playing Australia supported performances being 639 in 2015 (726 in 2013, 845 in 2011 and 931 in 2009).

	Productions entrepreneured at Full Risk		Productions entrepreneured at Shared Risk		Hires		Risk as a percentage Total Arts Activities		Productions Supported by Playing Australia		Productions Supported by State Funding Agencies	
	n=59		n=50		n=67				n=52		n=51	
	Seasons	Perfs	Seasons	Perfs	Seasons	Perfs	Seasons	Perfs	Seasons	Perfs	Seasons	Perfs
ACT	16	87	12	37	127	336	18%	27%	2	11	2	11
NSW	430	1,036	102	323	1,254	2,152	30%	39%	95	223	77	206
NT	24	52	1	10	47	47	35%	57%	-	-	2	4
QLD	233	443	22	41	526	1,165	33%	29%	61	109	53	113
SA	79	105	8	15	93	147	48%	45%	10	15	-	-
TAS	30	72	21	49	96	258	35%	32%	16	46	24	58
VIC	434	3,089	354	1,029	881	2,494	47%	62%	100	168	122	166
WA	165	220	21	67	354	561	34%	34%	55	67	51	76
Total	1,411	5,104	541	1,571	3,378	7,160	37%	48%	339	639	331	634

Table 13: Performing Arts Activity Levels

Figure 17 shows the total number of venue performances broken down by financial risk. Performances presented or co-presented by the respondents make up 48% of the total performances presented. This is a further increase from 2013 levels (41%) and 2011 levels (37%) and continues to demonstrate the growing trend towards entrepreneurial programming.

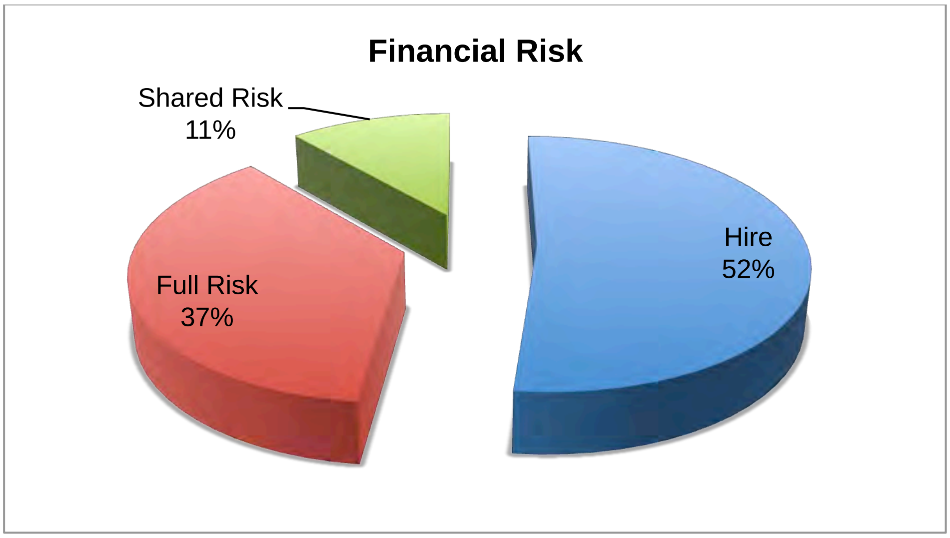

Figure 17: Performances Involving Financial Risk for Venue

Many Australian venues participate in processes that access Playing Australia funds to support the delivery of touring shows. Of the total events on which respondents incurred financial risk, Playing Australia supported 15% of performing arts seasons in the respondents' venues (a reduction from 21% in 2013 and 17% in 2011). This represented 4.6% of all venue performances (6% in 2013 and 7% in 2011) and 9.6% of venue entrepreneurial programming.

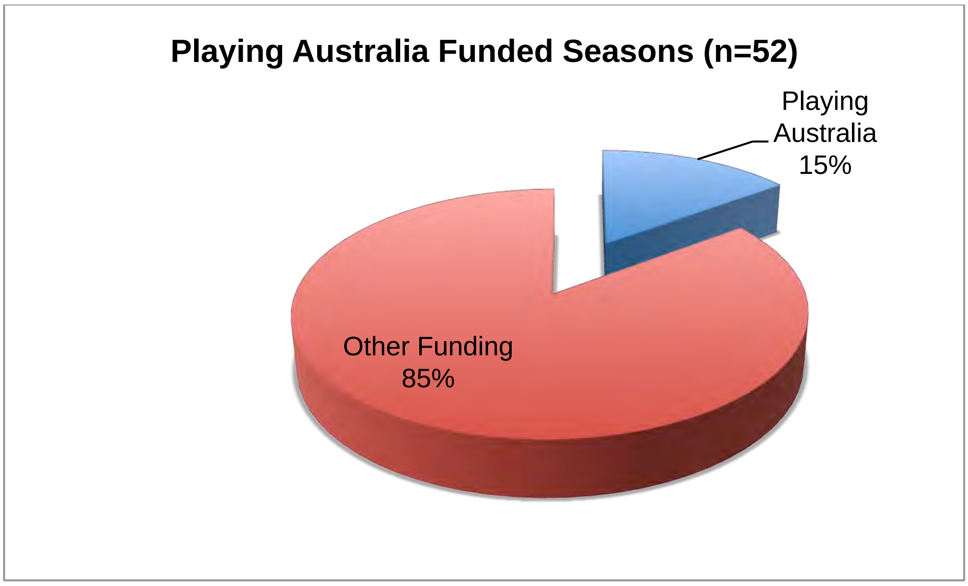

Figure 18: Playing Australia Funded Seasons as a percentage of Entrepreneurial (risk)

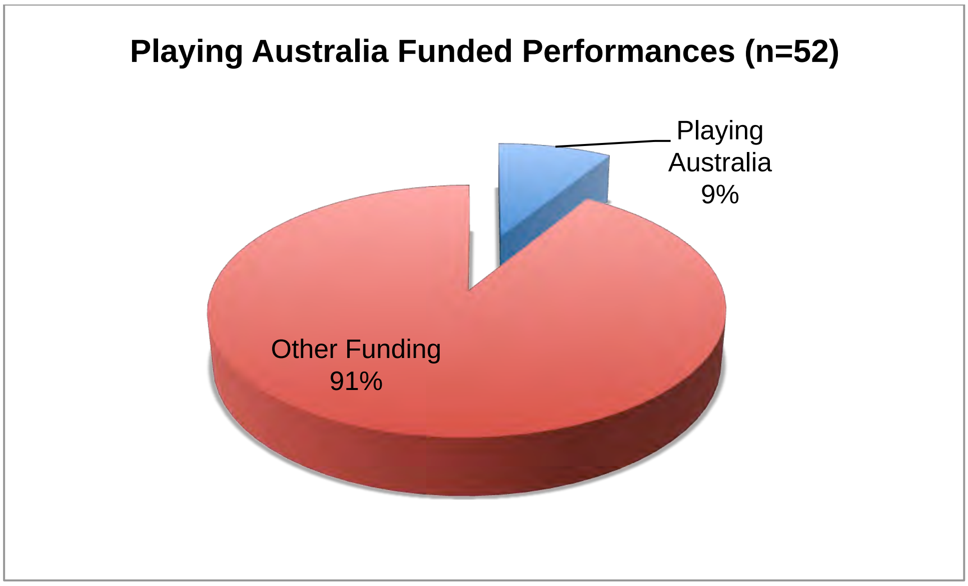

Figure 19: Playing Australia Funded Performances as a percentage of Entrepreneurial (risk)

The value of the investment regional venues across Australia make in bringing high quality touring productions supported by Playing Australia to their community was also captured in the 2015 survey.

The respondent venues program to take the entrepreneurial risk and allocate an annual budget towards performance fees, technical and front-of-house labour, marketing etc to successfully host a Playing Australia funded production.

36 venues, mainly regionally and remotely based, reported the value of the additional presentation funds made, as part of their programming commitment to Playing Australia funded productions was $5.7million.

	Playing Australia supported productions/seasons	Playing Australia supported performances	Avg # Performances per Production/Season
	n=68		
ACT	2	11	5.5
NSW	95	223	2.3
NT	0	0	-
QLD	61	109	1.8
SA	10	15	1.5
TAS	16	46	2.9
VIC	100	168	1.7
WA	55	67	1.2
Total	339	639	1.88

Table 14: Playing Australia Funded Seasons and Performances per State

State funding supporting productions touring to respondents' venues was captured for the first time in the 2015 survey. These results (14% state funding support of the total seasons presented by venues) reveal a similar percentage of tours were supported by the combined state agencies to that of the total seasons funded through Playing Australia.

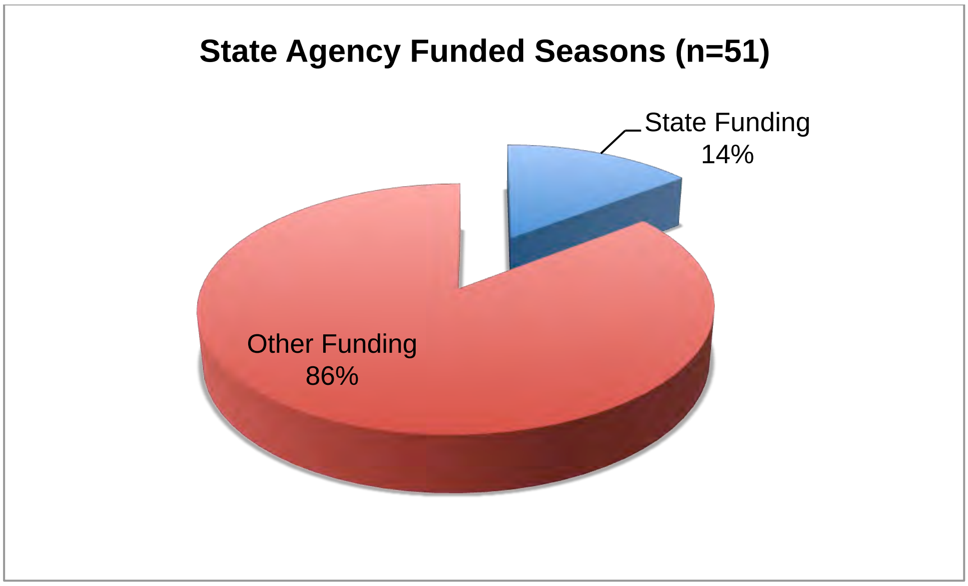

Figure 20: State Funding Agency Seasons as a Percentage of Total Arts Events

APPENDIX A: GLOSSARY

Performance: a single performing arts presentation e.g. in the season of A Midsummer Night's Dream there were 3 performances. This does not include closed rehearsals with audience or events as detailed below. A day of three sessions of Eisteddfod is considered to be three performances.

Season: a series of more than one performance (over a defined period of time i.e. a week) of any one production e.g. 3 performances of A Midsummer Night's Dream would constitute one season of that play.

Event: a non-performance presentation such as a wedding, conference, film, rehearsal, class, workshop, ceremony, exhibition etc. Individual classes and rehearsals are counted separately, unless rehearsals are on stage or under stage lights ("production week").

Entrepreneured: a show that a performing arts centre has proactively programmed, for which the organisation receives part of or total box office takings, and on which the performing arts centre takes or shares the financial risk.

Dedicated Programming Budget: a budgeted net expenditure that represents the net result of a centre's programming activities for the year - i.e. the contribution made by its owner or management to offset the financial loss from presenting program.

Activities: sum of all performances, films, lectures, seminars, conferences, workshops, rehearsals, exhibitions and other events [weddings, functions etc].

Activities of a non-arts nature: Product launches, conferences, functions etc of a non-arts related matter.

Community events: Hirers were charged a discounted rate or hire was valued at a discounted rate as part of in-kind support.

Commercial events: Hirers were charged a non-discounted rate or hire was valued at a non- discounted rate.

APPENDIX B: QUESTIONNAIRES

APACA

Introduction

This is part one of the three parts of the 2015 Biennial APACA Survey.

Please note, you can return to the survey any number of times to complete various questions and you can email your centre's survey link to various members of your team for completion of questions relevant to their area of responsibility

BUT, PLEASE DON'T USE A SURVEY LINK THAT HAS NOT BEEN SPECIFICALLY SENT TO YOUR CENTRE

We are going to ask you a range of questions about your activities over the past year.

If you report on a financial year then provide details for the 2014/15 year, if you report on a calendar year then provide details for the 2014 year.

If you have more than one venue include statistics for ALL venues in your answers ie: A 'centre' can include a number of individual venues.

If you had a production that only had one performance, count it as one season AND one performance.

Please enter figures without dollar signs, commas, spaces or decimal points.

If you require assistance regarding clarification of definitions and/or questions please direct your enquiry via email to Rick Heath [ed@apaca.com.au] or call 08 9298 8822 [please note WA time zone].

1. Your Name:

* 2. Organisation name: (ie the APACA member)

Other (please specify)

3. State:

◯ QLD ◯ NSW ◯ ACT ◯ VIC ◯ TAS ◯ SA ◯ WA ◯ NT

APACA

4. What is the management model of your organisation? (select one)
Local Gov't, Statutory Authority, Part of an Education body, Bus. Unit of State/Federal Gov't dept., Co Limited by Guarantee, Contract Management

5. Who is the owner of your venue? (select one)
Local Gov't, State Gov't, Federal Gov't, Private

Other (please specify)

6. What is the current estimated capital value of the centre you manage (including building and contents)? Please enter a figure without dollar sign, commas, spaces or decimal points.

7. What is the total estimated number of people in your catchment area. i.e. that your organisation makes services available to (including outlying areas)?

8. What is the distance, in kms, to the state or territory capital city nearest you, which may be in another state or territory ?

9. What is the age of your centre/venue in years?

10. How many years is it since your centre had a capital upgrade [greater than $250K]?

APACA

Venue Capacity and Utilization

* 11. How many performance spaces are owned or managed by your organisation?

12. What is the TOTAL combined seated capacity of ALL the performance venues you manage?

13. At the end of the year in which you're accounting, how many days in that year was this performance space available for hire but not used?

(If you report on a financial year then 2012/13 year OR if you report on a calendar year then 2012 year)

Performance Space 1

Capacity (the maximum seated capacity of the performance space per performance)

Total Days per annum venue available for hire (e.g. excluding maintenance days etc)

Whole days NOT used per annum (i.e. when the venue was not used and could have been available for hire or self presenting, preparation or performance)

APACA

Venue Capacity and Utilization for more than one venue

14. Performance Space 2

Capacity (the seated capacity of the performance space per performance)

Total Days per annum venue available for hire (eg excluding maintenance days etc)

Whole days NOT used per annum

15. Performance Space 3

Capacity (the seated capacity of the performance space per performance)

Total Days per annum venue available for hire (eg excluding maintenance days etc)

Whole days NOT used per annum

16. Performance Space 4

Capacity (the seated capacity of the performance space per performance)

Total Days per annum venue available for hire (eg excluding maintenance days etc)

Whole days NOT used per annum

17. Performance Space 5

Capacity (the seated capacity of the performance space per performance)

Total Days per annum venue available for hire (eg excluding maintenance days etc)

Whole days NOT used per annum

APACA

Productions and Performances

This section relates to your Performing Arts activities - NOTE: productions reported on in this section do not include other non-cultural events.

Definitions
Performance: a single Performing Arts presentation e.g. in the season of A Midsummer Night's Dream there were three performances. This does not include closed rehearsals with audience or events as detailed below. A day of three sessions of Eisteddfod is considered to be three performances.

Season: a series of more than one performance (over a defined period of time i.e. a week) of any one production e.g. three performances of A Midsummer Night's Dream would constitute one season of that play.

Event: a non-performance presentation such as a wedding, conference, film, rehearsal, class, workshop, ceremony, exhibition etc. Count individual classes and rehearsals separately, unless rehearsals are on stage or under stage lights ("production week").

Entrepreneured: a show that your venue has proactively programmed, that your organisation receives part of or total box office takings and on which you take, or share financial risk.

(If you report on a financial year then please use the 2014/15 year OR if you report on a calendar year then please report on 2014)

18. Of the productions you entrepreneured last year, on how many did you take the full financial risk?

Number of productions/seasons:

Number of performances:

19. Of the productions you entrepreneured last year, on how many did you co-produce/co-present (ie: you shared the financial risk)?

Number of productions/seasons:

Number of performances:

20. Of the total number of productions presented at your Centre last year that you had a financial risk in [professional and non-professional], how many were financially supported by Playing Australia?

Number of productions/seasons:

Number of performances:

21. Of the total number of productions presented at your Centre last year that you had a financial risk in [professional and non-professional], how many were financially supported by State Government Support?

Number of productions/seasons	
Number of performances	

22. Of the total number of productions undertaken at your Centre last year, how many were considered ‘community’ (ie: you charged a discounted rate or valued hire at a discounted rate as part of your in-kind support)?

Number of productions/seasons:

Number of performances:

23. How many productions were outside hires last year (ie: you had no financial risk)?

Number of productions/seasons:

Number of performances

APACA

Productions and Performances

This section relates to your Performing Arts activities - NOTE: productions reported on in this section do not include other non-cultural events.

Definitions
Performance: a single Performing Arts presentation of 1-3 hours duration e.g. in the season of A Midsummer Night's Dream there were 3 performances. This does not include closed rehearsals with audience or events as detailed below. A day of three sessions of Eisteddfod is considered to be three performances.

Season: a series of more than one performance (over a defined period of time ie a week) of any one production e.g. 3 performances of A Midsummer Night's Dream would constitute 1 season of that play.

Event: a non-performance presentation such as a wedding, conference, film, rehearsal, class, workshop, ceremony, exhibition etc. Count individual classes and rehearsals separately, unless rehearsals are on stage or under stage lights ("production week").

Entrepreneured: a show that your venue has proactively programmed, that your organisation receives part of or total box office takings and on which you take, or share financial risk.

24. Of the total number of productions undertaken at your Centre last year, how many were considered 'commercial' (ie: you charged a non-discounted rate or valued hire at a non-discounted rate)?

Number of productions/seasons:

Number of performances:

25. What is the total attendance at performances (i.e. do not include non-performance events such as weddings) at your Centre for the last year?

Other events

26. What is the total number of activities at your Centre for the last year?
Include the sum of all performances, films, lectures, seminars, conferences, workshops, rehearsals, exhibitions and other events [weddings, functions etc].

27. Of all the activities/events counted above how many were of a non-arts nature?
E.g. product launches, conferences etc of a non-arts related matter

28. What is the total number of attendees to all your performances and events held at your centre?

THANK YOU

29. Do you have any comments regarding questions that you found difficult to answer ?

30. Any comments and/or feedback

Appendix 6 - Venues and Charges Report: Australian Performing Arts Centres Association (July, 2015)

2015 Venue Charges and Salaries Report

Australian Performing Arts Centres Association

www.apaca.com.au

Published August 2016

Prepared by Ruth Hodgman / Visual Focus

Table of Contents

Table of Figures **3**

INTRODUCTION **4**

AIM **4**

METHODOLOGY **4**

Response Rates *5*

RESPONDENT PROFILE **5**

REMUNERATION AND EMPLOYMENT CONDITIONS **7**

Centre Managers *7*

Venue Staff *13*

Staffing Levels *17*

Venue Operations **19**

Commercial Hire Rates – Primary Space *19*

Commercial Hire Rates – Secondary Space *20*

Commercial Hire Rates - Tertiary Space *21*

Additional Performance Spaces *22*

Community Rates *22*

Community Hire Rates - Primary Space *23*

Community Hire Rates – Secondary Venue *24*

Community Hire Rates – Tertiary venue *25*

Community Rates – Additional Spaces *26*

Hire Package Inclusions **26**

Staff Charge Out and Minimum Staffing *28*

Staff Charge Out Rates *29*

Minimum Staffing Levels *31*

Ticketing Operations **36**

Ticketing Charges *38*

Subscribers and Volunteers **44**

Other Venue Services and Charges **46**

Appendix A – Respondents **50**

Appendix B – Survey Questionnaire **52**

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Prepared by Ruth Hodgman

Cover Photo from shake & stir's production of George Orwell's 1984.
Image by Dylan Evans
Performers (left to right) Nick Skubij, Bryan Probets, Nelle Lee, David Whitney, Ross Balbuziente

Table of Figures

Figure 1: Respondents by State *5*
Figure 2: Venue Turnover of Respondents *6*
Figure 3: Respondents by Audience Capacity of Primary Space *6*
Figure 4: Comparative Performance Space Sizes *7*
Figure 5: Centre Managers' Total Remuneration *8*
Figure 6: Centre Managers' Cash Salary by Venue Turnover *8*
Figure 7: Provision of Vehicle by Turnover *9*
Figure 8: Centre Managers' Other Benefits *9*
Figure 9: Additional Superannuation rates *10*
Figure 10: Managers' Salary Comparison 2011 to 2015 .... *10*
Figure 11: Employment Basis for Centre Managers *11*
Figure 12: Additional Responsibilities taken by Centre Managers *12*
Figure 13: Additional Responsibilities taken by Centre Managers *12*
Figure 14: Centre Managers' Overtime Remuneration *13*
Figure 15: Overtime Remuneration Comparison 2011 to 2015 .... *13*
Figure 16: Venue Staff Salaries - Turnover $0 - $1M *14*
Figure 17: Venue Staff Salaries - Turnover $1M - $2M *14*
Figure 18: Venue Staff Salaries - Turnover $2M - $5M *15*
Figure 19: Venue Staff Salaries - Turnover $5M - $10M *15*
Figure 20: Staff Overtime *16*
Figure 21: Venue Staff Industrial Agreements *16*
Figure 22: FTE Staff per Department – Turnover $0 to $1M *17*
Figure 23: FTE Staff per Department – Turnover $1 to $2M *17*
Figure 24: FTE Staff per Department – Turnover $2 to $5M *18*
Figure 25: Total Employment in Respondent Venues *18*
Figure 26: Qualification Criteria for Community Hire Rates *22*
Figure 27: Hire Package Inclusions – Commercial –v- Community *26*
Figure 28: Marketing Services for Hirers *27*
Figure 29: Cleaning Charges *27*
Figure 30: Ticketing Systems used by Respondents *36*
Figure 31: Points-of-Sale per Venue *37*
Figure 32: Frequency of Sales Channel Usage (on-line, telephone & counter sales) *37*
Figure 33: Frequency of Usage for External Sales Channels *38*
Figure 34: Card Merchant Fee Payment *38*
Figure 35: Use of Volunteers *46*
Figure 36: Food and Beverage Services *47*
Figure 37: Commissions on Programs, Merchandise and Equipment Hire *47*

INTRODUCTION

The Australian Performing Arts Centres' Association (APACA) represents 190 organisations throughout Australia. 63% of these members operate a professionally managed performing arts centres. Other members (37%) are from organisations that have substantially similar objectives to the Association and include producing companies, touring organisations and funding bodies. Our members operate predominantly in the subsidised sector. There are four international members.

The performing arts centres' sector presents productions from a vast array of art forms from plays, opera and classical music, to comedy, circus and contemporary dance. Typically the sector operates with a limited resource base in service of delivering benefits to their community. Whilst members are geographically dispersed, technology facilitates regular communication that has developed the sector into a strong network.

AIM

The primary aim of the survey is to provide members with a benchmark document that allows for comparison of centres of a similar scale or those in the same state.

More specifically, the information contained in this report is designed as a tool to allow performing arts centres to review the salaries and charges associated with arts centre operation, or in some cases, benchmark performance. Managers of existing or proposed arts centres can use this information when setting or reviewing salaries and charges, or more broadly, in the development or review of business plans.

METHODOLOGY

This survey is undertaken biennially and the questionnaire reviewed each time to minimise respondent burden and maximise participation in order to provide a strong representation of the sector.

A review was undertaken prior to commencing the survey design in an attempt to clarify terminology, maximise participation in order to provide a strong representation of the sector and ensure the information presented met member needs. Based on feedback, the geographic disparity of respondents and the extent of variables to be considered in the survey, an online survey tool was considered most effective in achieving high response rates. The questionnaires were distributed over a period November to 2015 to January 2016 through Survey Monkey to Ordinary members only, i.e. those members who manage performing arts venues.

The survey tools can be found at Appendix B. Where possible, closed questions were asked requiring respondents to tick boxes or use drop down menus, however some questions required specific quantities and dollar values to be inserted by respondents. Conversely, for some questions it was important to provide an opportunity for respondents to clarify responses and opportunities for general comments were given.

Data on the industry with turnover greater than $5M has been omitted from graphs where the limited number of respondents made it impossible to not disclose specific respondent details.

Response Rates

Response rates were slightly higher than the previous survey in 2013, (70 vs 66) and represent 58% of the Ordinary (venue) membership (List of respondents at Appendix A). As response to each section was voluntary, the number of responses varies by question. All questions received sufficient response from the population of interest for the responses to be regarded as reliable. The limited sample of respondents with turnover greater than $5 million produced some skewed data, due to the diversity of that group, and a differing understanding of the questions, so responses have only been included when the data is consistent enough to be judged to be indicative.

Data for turnover was provided by 42 venues that responded to the Economic survey distributed by APACA. As responses to each section was voluntary, the number of responses relating to the section's analysis is noted against the tables and figures in this report.

RESPONDENT PROFILE

A full list of respondents is attached at Appendix A. The following charts show the breakdown of the respondents by state, turnover and size of primary space. A similar sample of venues from each State/Territory was represented in previous surveys conducted by APACA in 2011 and 2013.

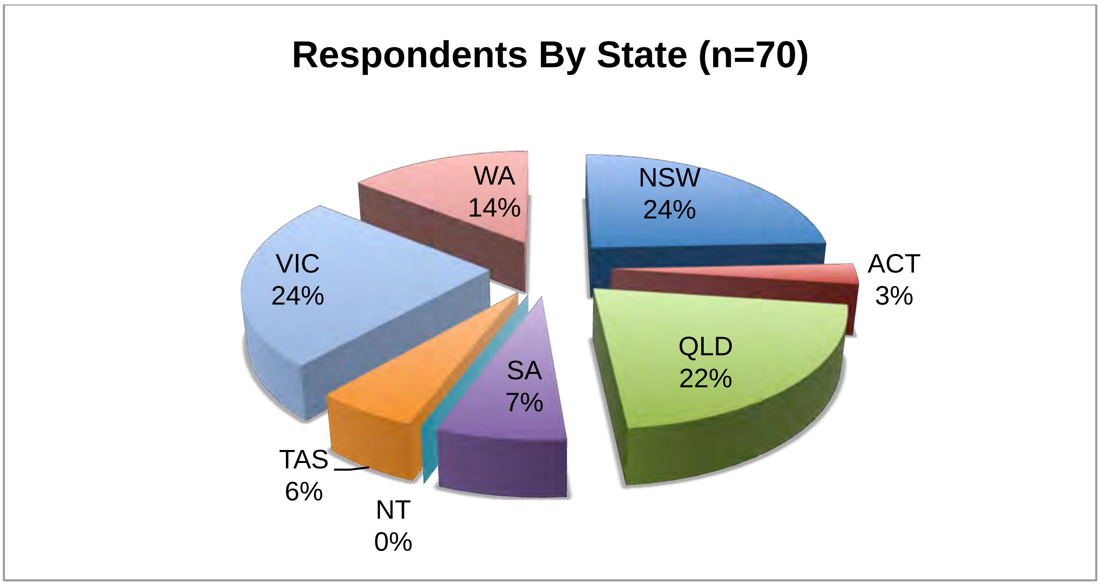


Figure 1: Respondents by State

The range of turnover defined in previous surveys has been maintained for comparison. Overall, smaller size venues have increased their total turnover particularly noting the two low ranges ($0 to $2 million) have moved from 56% in 2013 down to 50% in 2015. The upper range of over $10million has decreased from 5% in 2013 to 2% in 2015. The larges increase is found in venue turnover of between the $2 and $10 million range, with a rise from 40% to 48% in 2015.

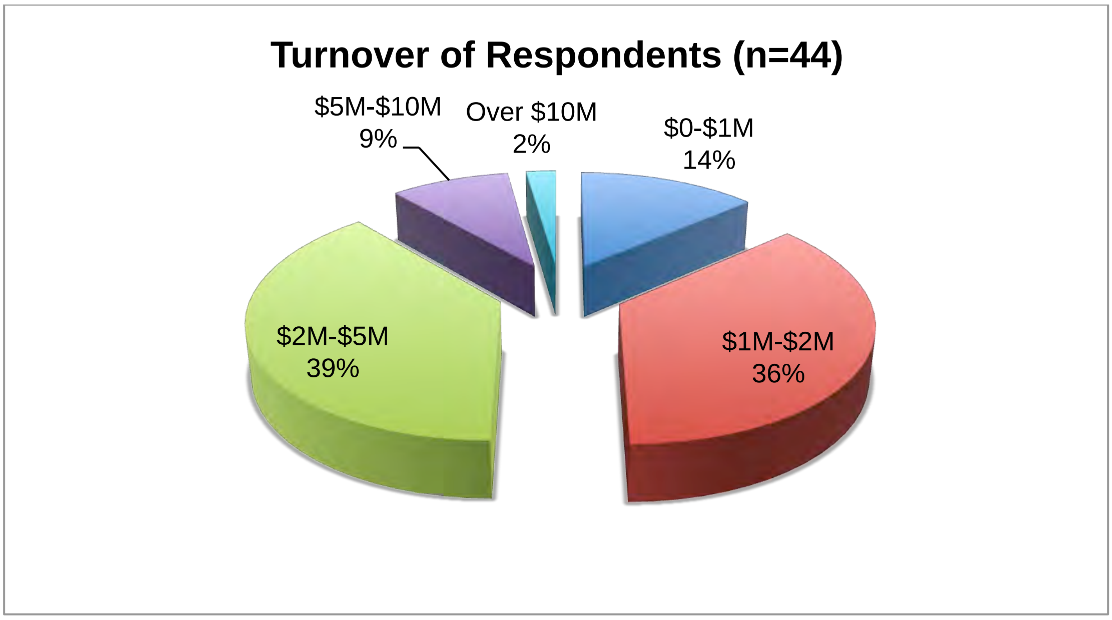


Figure 2: Venue Turnover of Respondents

More than half of the respondents (53%) have venues with primary spaces between 500 and 999 seating capacity. This result is an increase from 48% in 2013. Performing arts centres generally have more than one auditorium available for public use.

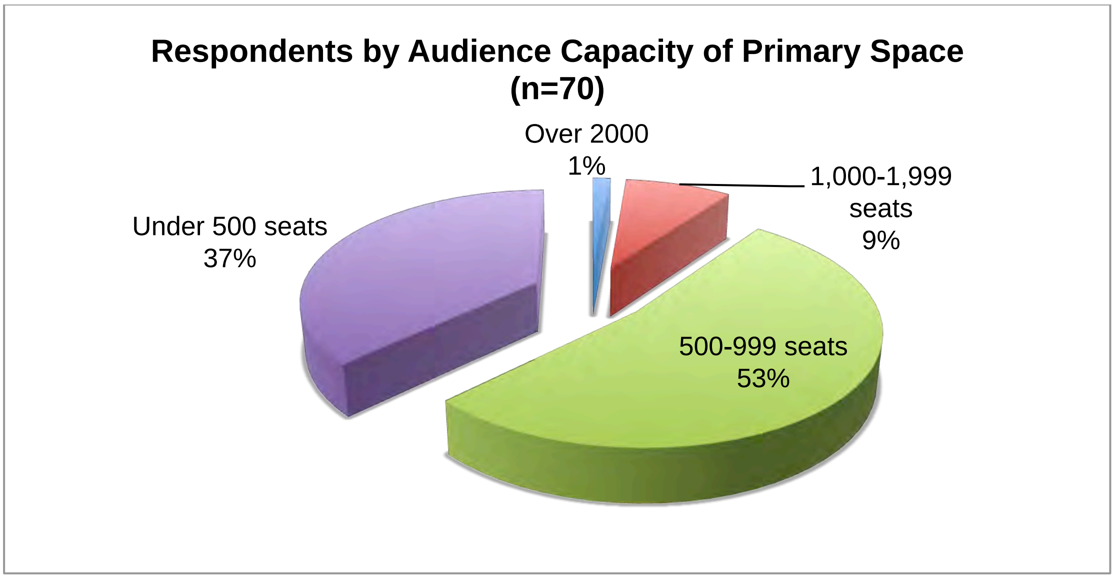


Figure 3: Respondents by Audience Capacity of Primary Space

A total of 70 venues reported a primary space with the number for each based on seating capacity sizes shown in Figure 4 below. Secondary and tertiary spaces were only reported by 14 and 6 venues respectively.

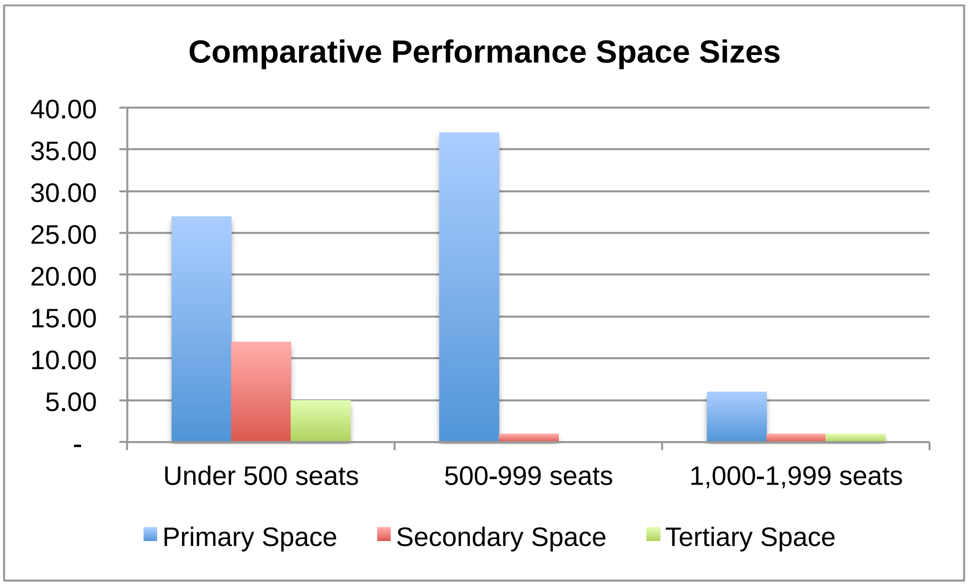


Figure 4: Comparative Performance Space Sizes

REMUNERATION AND EMPLOYMENT CONDITIONS

Centre Managers

Performing arts centre managers are often remunerated with a package that may include a vehicle, mobile phone, laptop and other benefits. The following chart (Figure 5) shows managers' comparative remuneration packages by their organisation's turnover. In determining salary levels, respondents were asked to select from pre-defined salary ranges rather than provide specific salary figures.

As well as showing the range of packages (highest and lowest), for a better understanding of the range we have included the mode – the value that appears most often, and the median – the middle value of the data set.

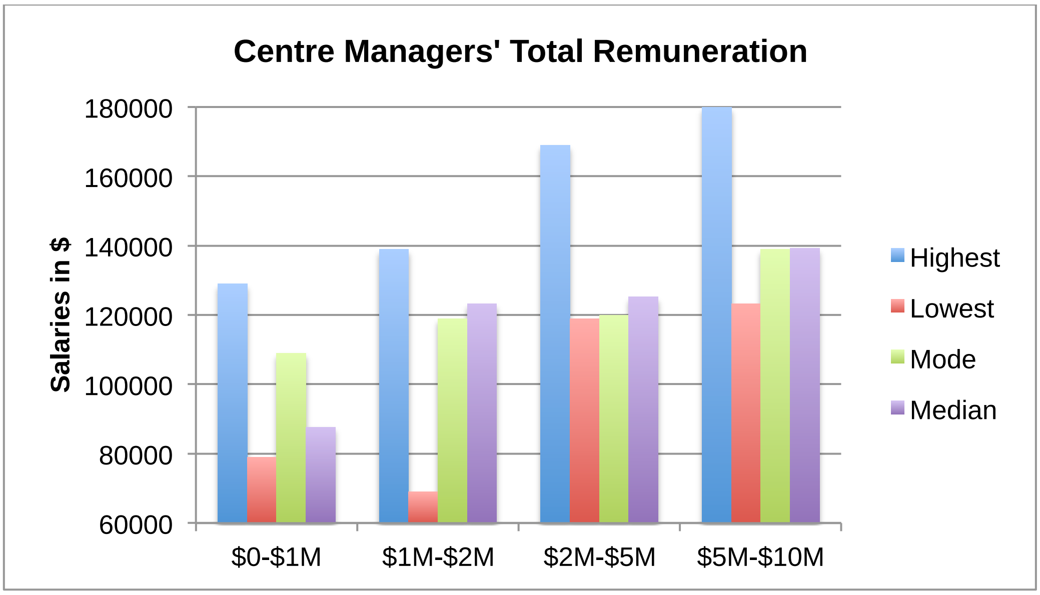


Figure 5: Centre Managers' Total Remuneration

The following charts breaks down the centre managers' remuneration packages into their component parts.

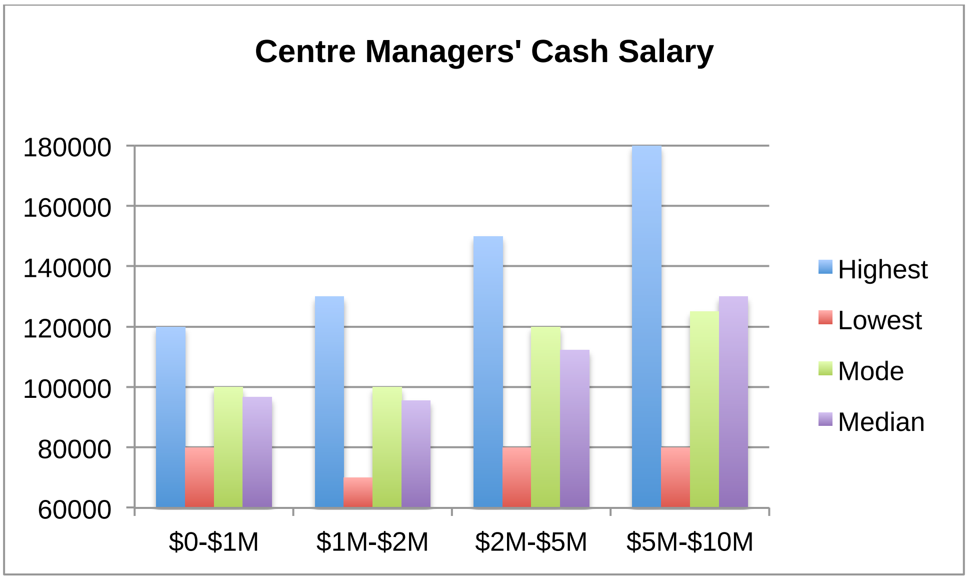


Figure 6: Centre Managers' Cash Salary by Venue Turnover

Overall, 48.9% of managers receive access to a vehicle and 36.2% of managers have full access to a vehicle. Compared to 2013 results, this benefit is received by fewer managers (55% had some level of access to a vehicle in 2013). 10.6% of managers receive a payment for use for a novated lease. Figure 7 provides the percentages of managers that have access to an arrangement for the provision of a vehicle within their remuneration package, broken down by venue turnover.

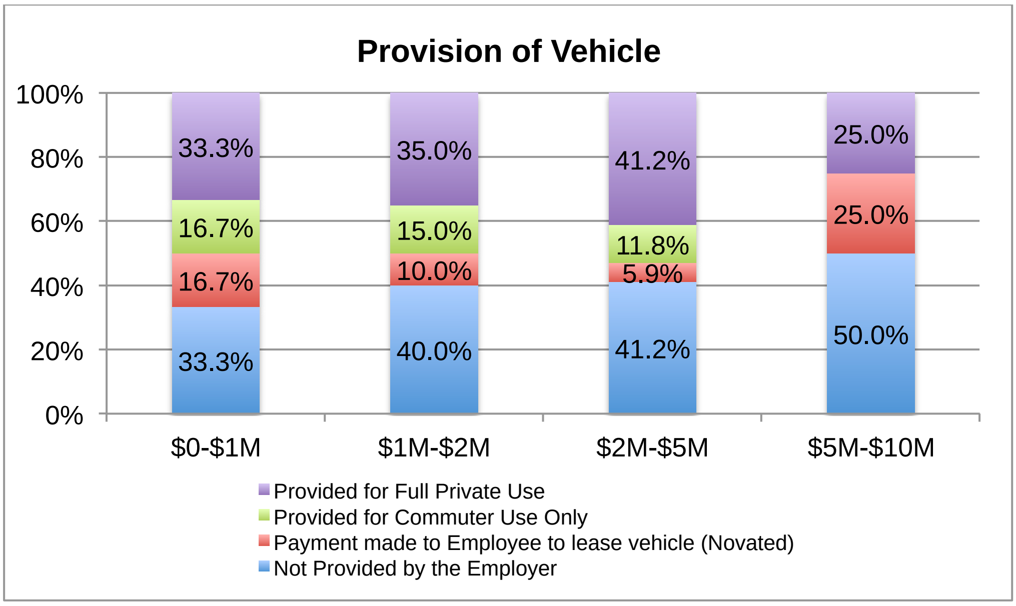


Figure 7: Provision of Vehicle by Turnover

The following chart (Figure 8) shows other benefits received by managers and the percentage of access for each benefit grouped into categories of venue turnover. Use of a mobile phone for either all calls or for business calls is provided to a total of 86% of managers. Travel for professional development is also a common benefit received by 67.4% of all managers.

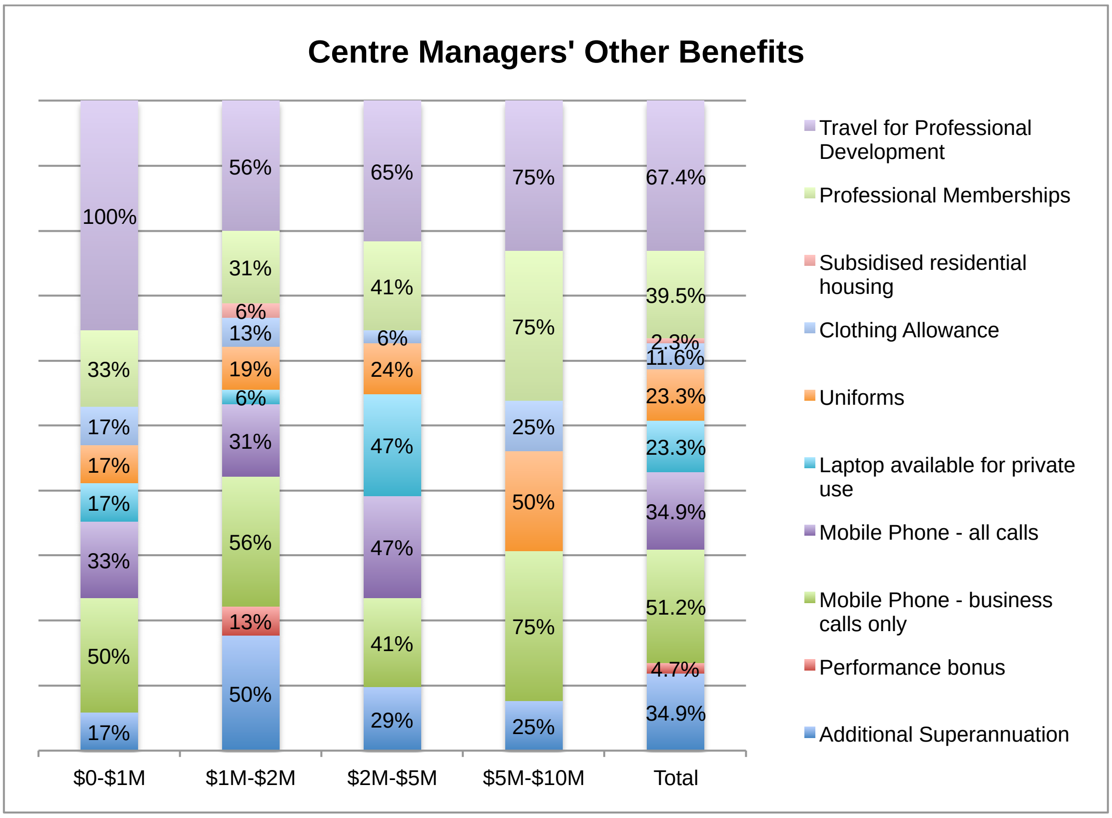


Figure 8: Centre Managers' Other Benefits

The superannuation rates for those who receive additional superannuation are shown below.

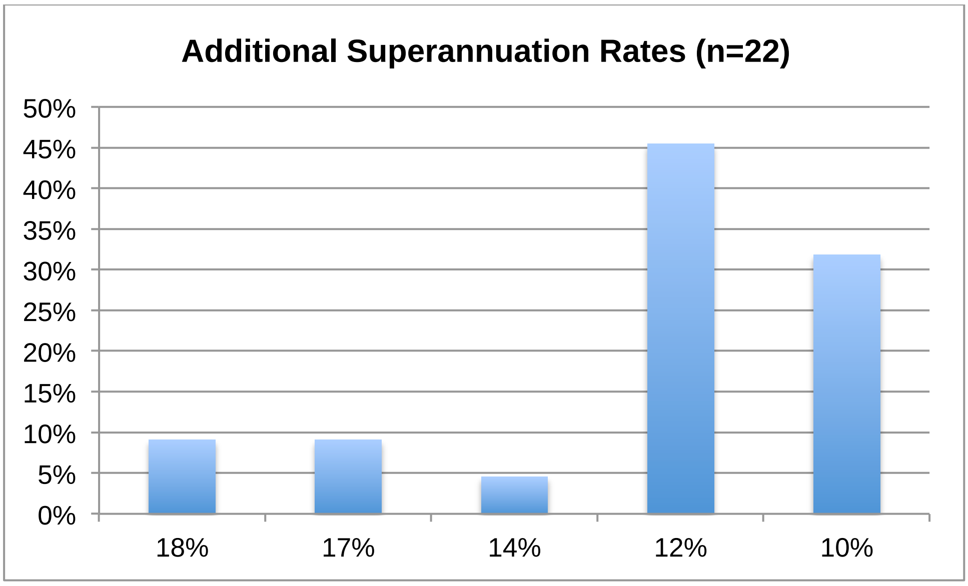


Figure 9: Additional Superannuation rates

A comparison of managers' salaries from the survey conducted in 2011, 2013 and 2015 (Figure 10) uses the highest salary level in the range as the comparison point and annual turnover as categories. The result shows a reduction in two ranges, for managers of venues with turnover between $1 M to $5 M. In 2013, it was noted that the large increase in the $2M to $5M range was partly attributed to a selection of different venues and a small data set.

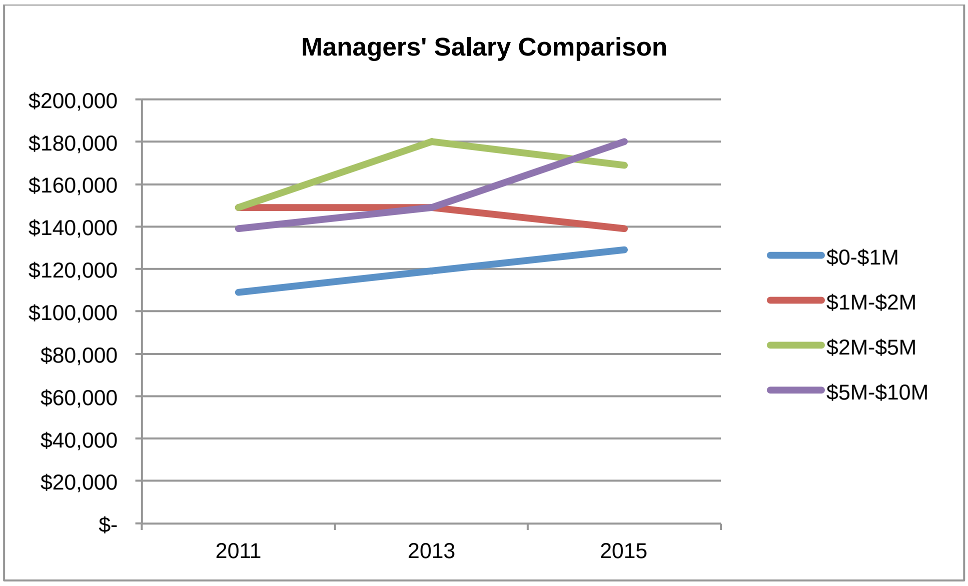


Figure 10: Managers' Salary Comparison 2011 to 2015

Performing arts centre managers are often employed on a different basis to their staff. The following chart shows a high incidence of private contracts although the percentage of occurrence has reduced by 3% since the 2013 survey. Managers employed by industrial award have increased by 2% and enterprise agreements have increased by 1%.

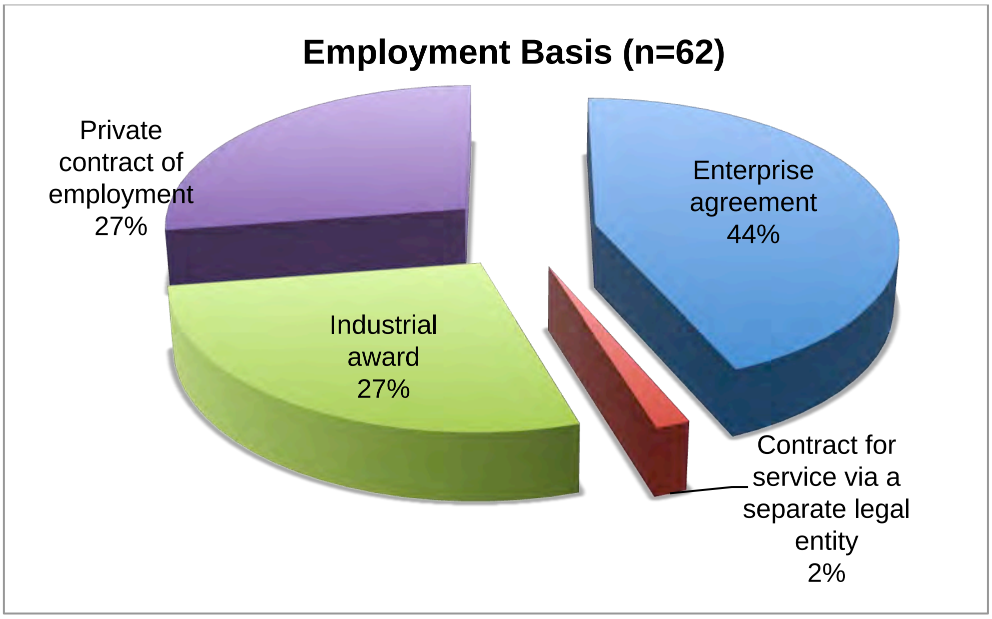


Figure 11: Employment Basis for Centre Managers

The breadth of the sector is demonstrated by the range of the responsibilities undertaken by centre managers in addition to the programming and management of their venue. The most common added responsibility is Events and Community Celebrations with 34% reporting it as part of their role, which has increased by 5% in each survey from 2011 and 2013. Management of Arts Galleries or Visual Arts programs has also increased across surveys from 17% to 21% while the management of various services including leases, food and beverage outlets as well as Tourism Information Centres, Sports Stadiums and Function Centres are included in an increasing number of Centre Manager roles, increasing from 9% in 2011 to 18% in 2015.

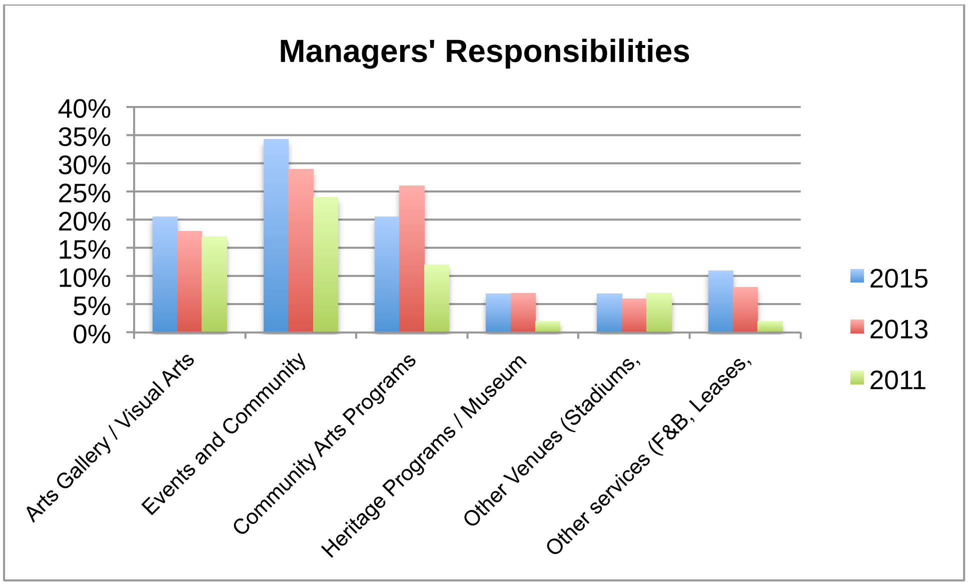


Figure 12: Additional Responsibilities taken by Centre Managers

Centre managers were asked to estimate their average weekly hours over the previous three months prior to the survey. Overall, centre managers commitment of work hours has remained constant. In 2013, 75% of managers reported their working week was more than 40 hours (an increase of 8% over 2011) which is consistent with the 2015 result. In 2015, the survey provided an additional category asking for work hours more than 50 hours per week, with 10% of managers reporting this time commitment.

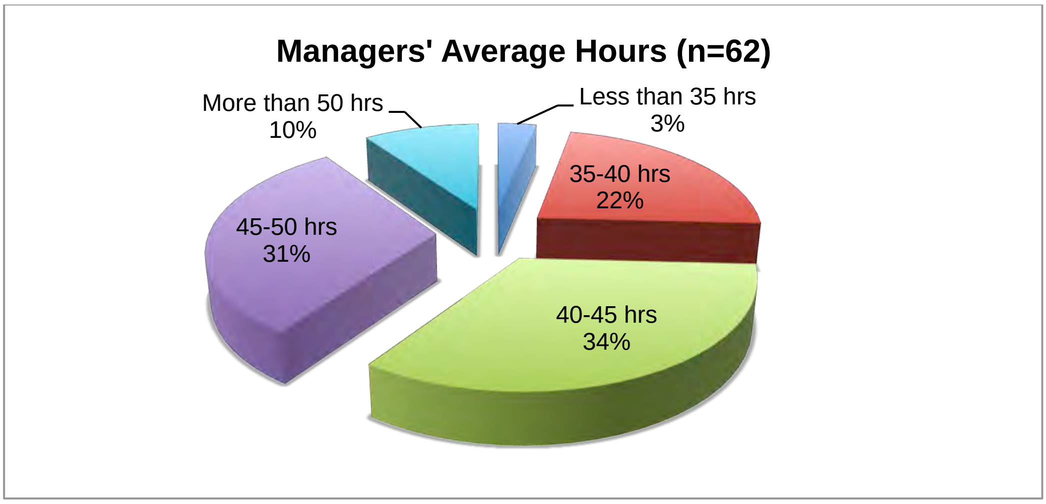


Figure 13: Additional Responsibilities taken by Centre Managers

Centre managers were asked to clarify how overtime was remunerated. TOIL (Time off in lieu of payment) is the most common way of dealing with overtime, particularly for venues with less than $2M turnover. Three venues reported receiving additional payment for overtime. Venues with higher turnover more commonly have overtime included within their salary. Work/life balance is a concern in many workplaces and in this survey, 19% of all venue managers reported that additional hours and overtime is 'largely ignored'.

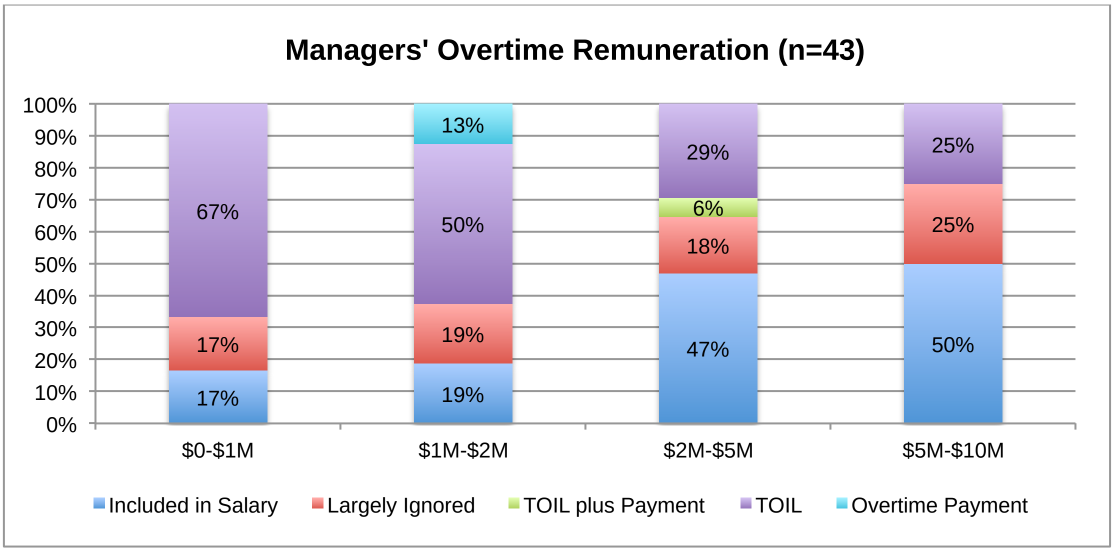


Figure 14: Centre Managers' Overtime Remuneration

When comparing the 2015 results with the past two surveys, the category 'largely ignored' has shown an increase of 5% while TOIL has reduced by 3% since 2013. The acknowledgment via payment for overtime was only reported by two venues with a turnover between $1M and $2M. The availability of TOIL plus overtime payment has reduced significantly and was only reported by one venue in 2015.

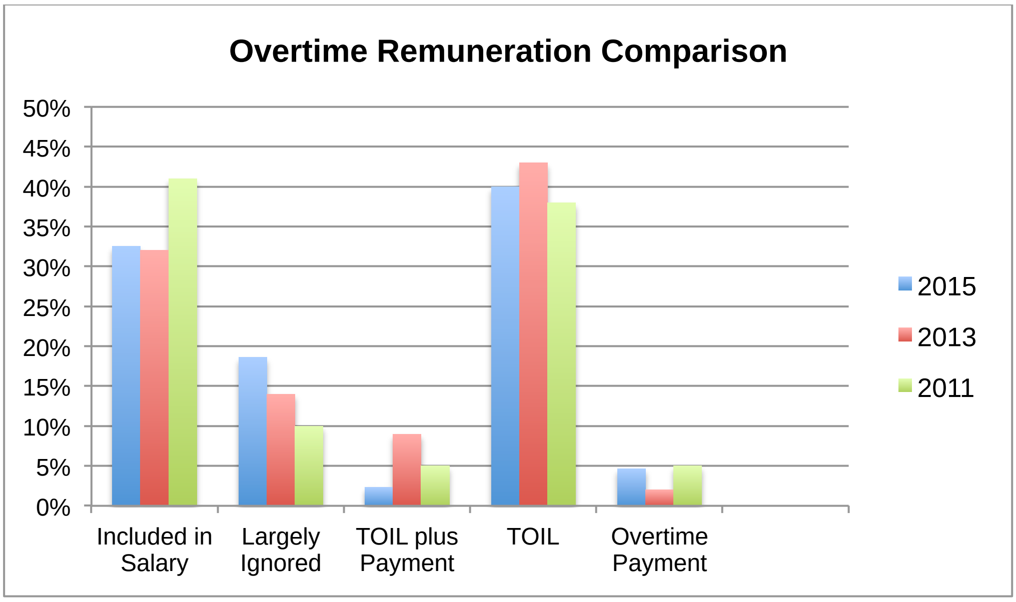


Figure 15: Overtime Remuneration Comparison 2011 to 2015

Venue Staff

Similar to the information on centre managers' remuneration, respondents were asked to select from pre-defined salary ranges rather than provide specific salary figures. Once again, for a better understanding of the range we have included the mode – which is the value that appears most often, and the median – which is the middle value of the data set. The information is presented by organisation turnover to assist with comparisons.

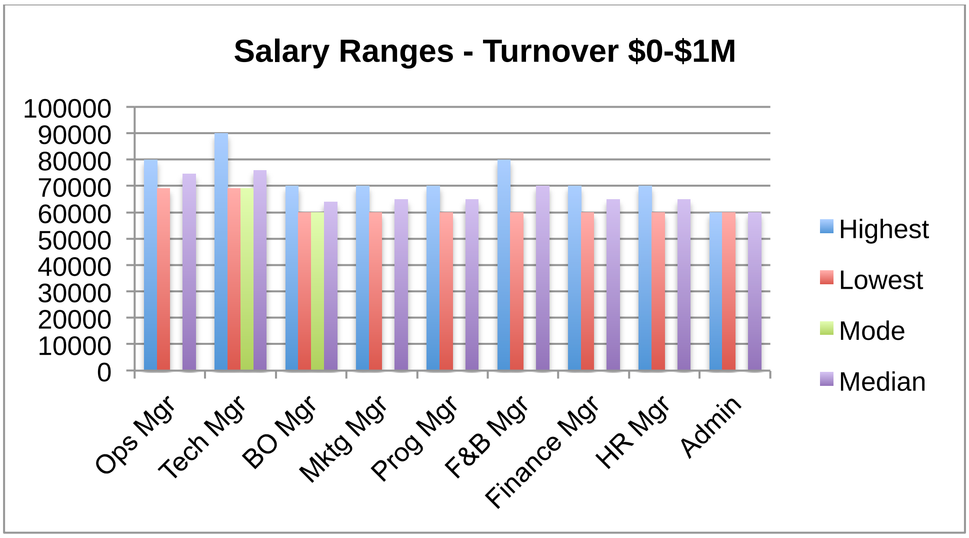


Figure 16: Venue Staff Salaries - Turnover $0 - $1M

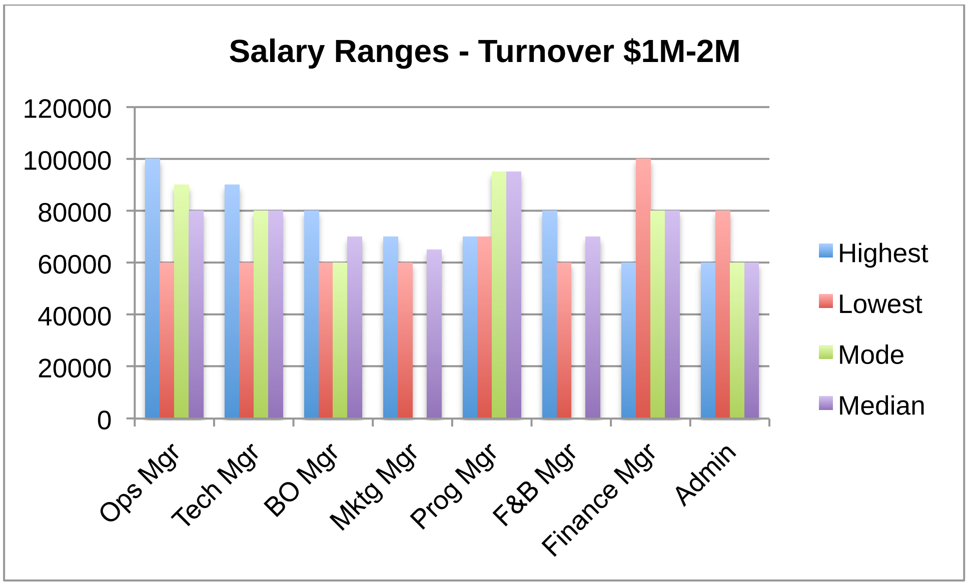


Figure 17: Venue Staff Salaries - Turnover $1M - $2M

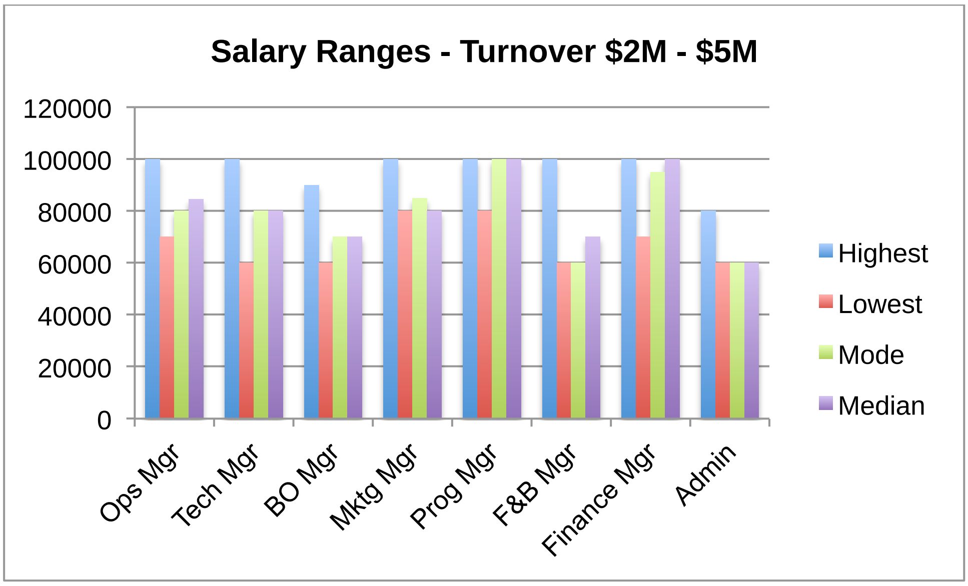


Figure 18: Venue Staff Salaries - Turnover $2M - $5M

In the group of venues with turnover between $2M and $5M there was no data reported for Human Resource Managers (Figure 18). For Administration personnel, the majority of venues reported their staff are paid at $60,000 or less.

In Figure 19, the number of venue respondents is small and data was not provided for salary ranges for Program or Human Resource Manager roles. Finance Manager and Administration roles were only reported by one of these venues.

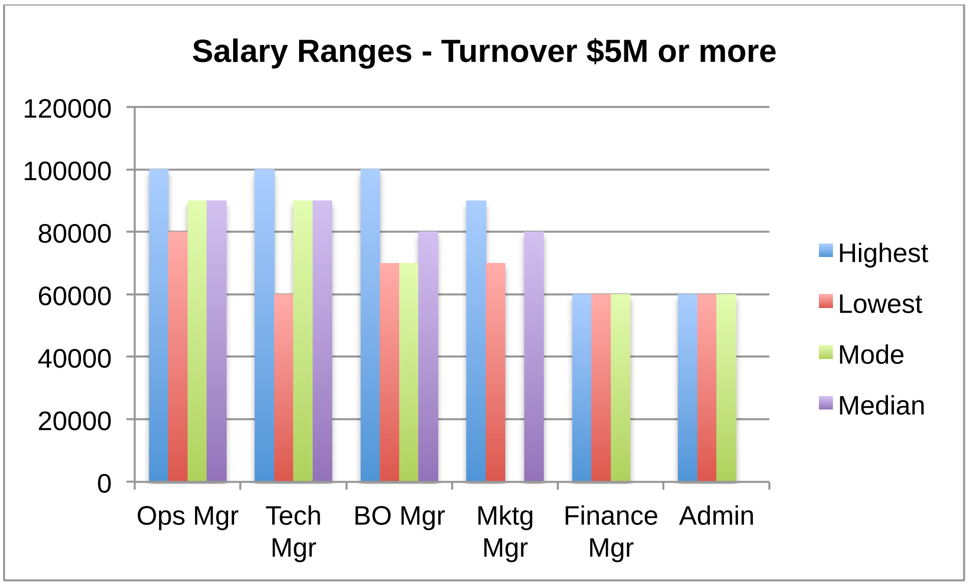


Figure 19: Venue Staff Salaries - Turnover $5M - $10M

The following charts show different aspects of conditions of employment.

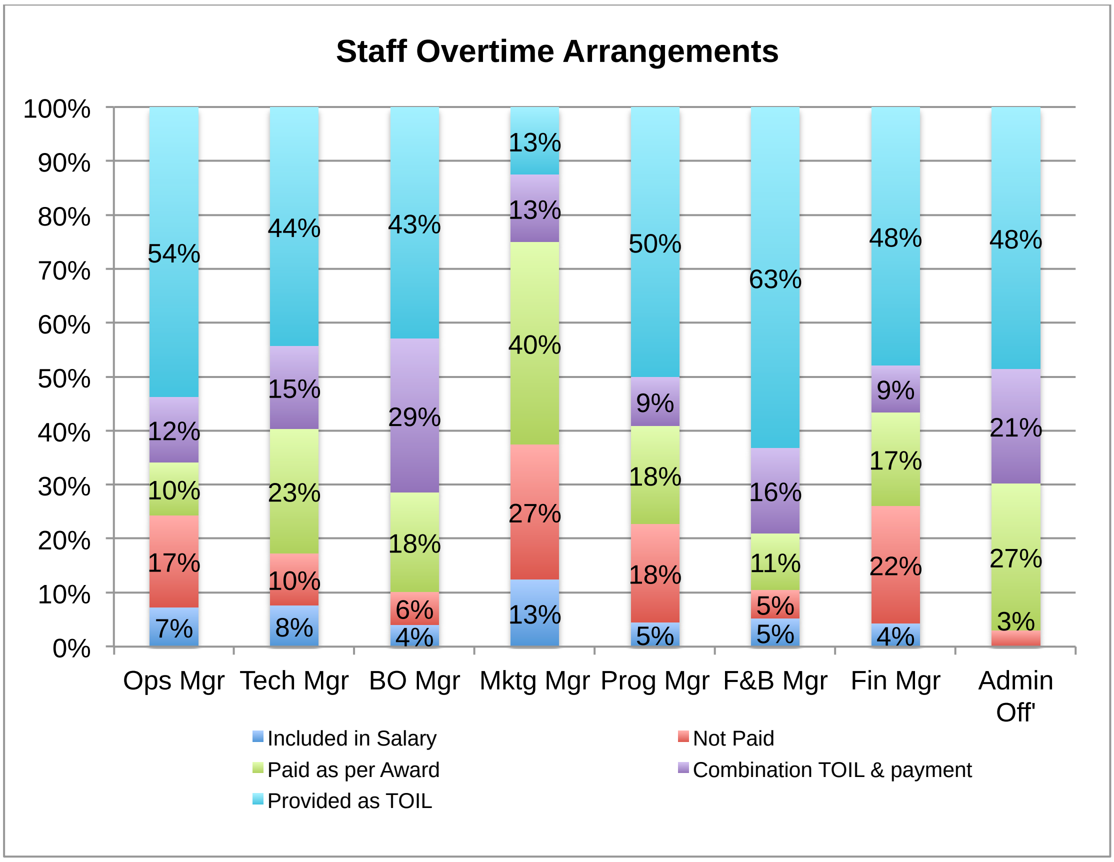


Figure 20: Staff Overtime

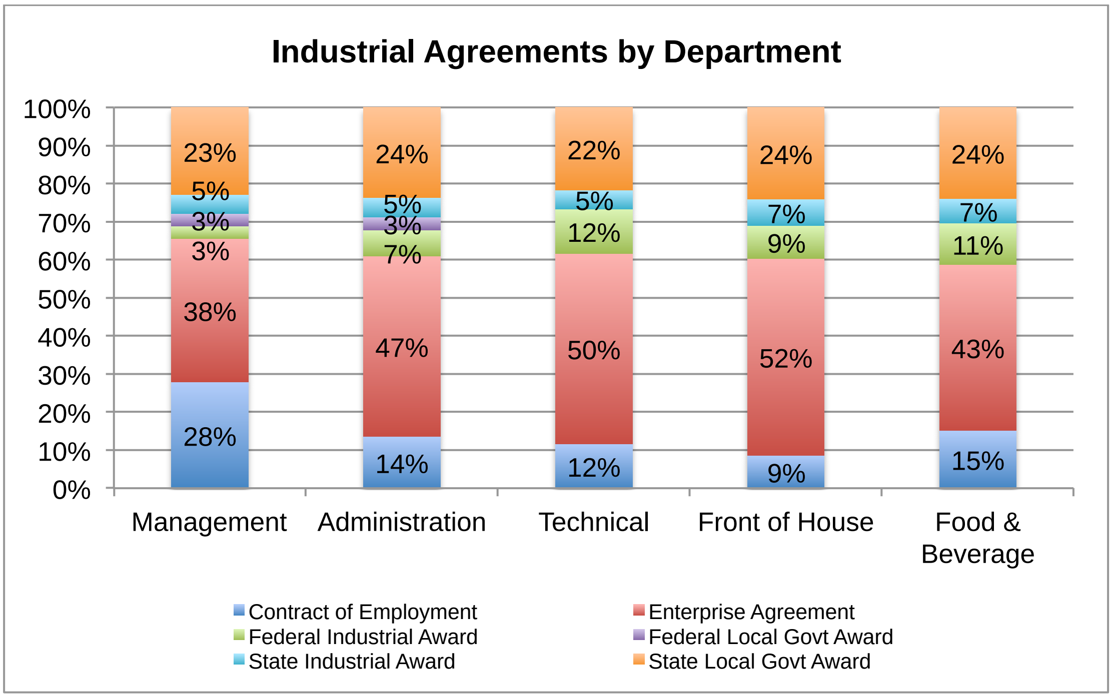


Figure 21: Venue Staff Industrial Agreements

Staffing Levels

The following charts plot the number of full-time equivalent (FTE) staff employed by centres across the various departments. It shows the percentage of respondents that staff each department at a particular level of FTEs. Data from centres with a turnover of more than $5M was insufficient to be significant and has been omitted.

In respondent venues with a turnover of less than $1million per annum, there is no public programs department.

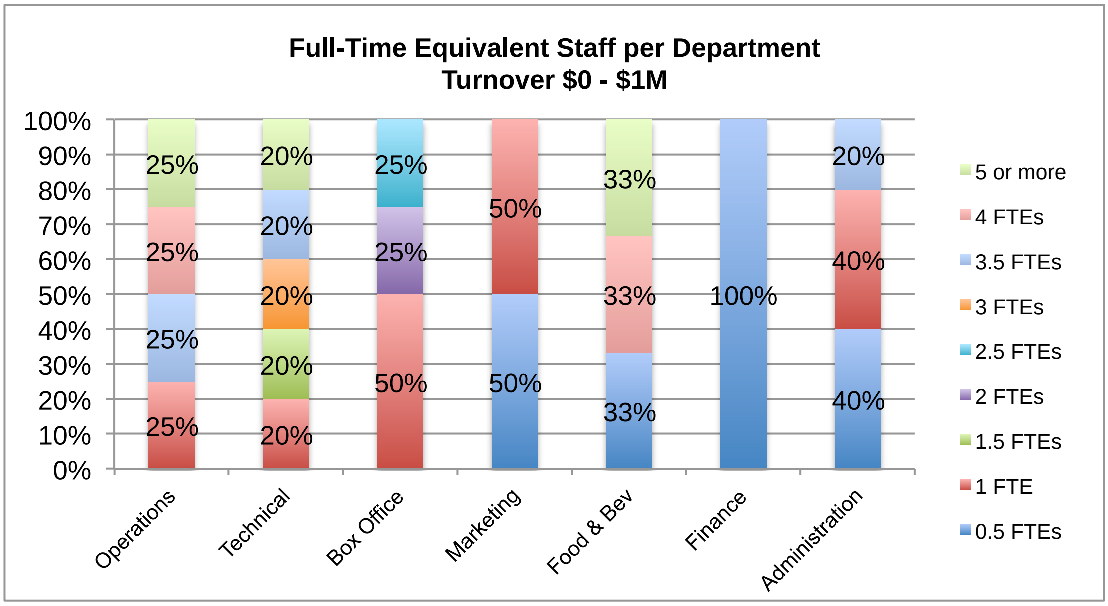


Figure 22: FTE Staff per Department – Turnover $0 to $1M

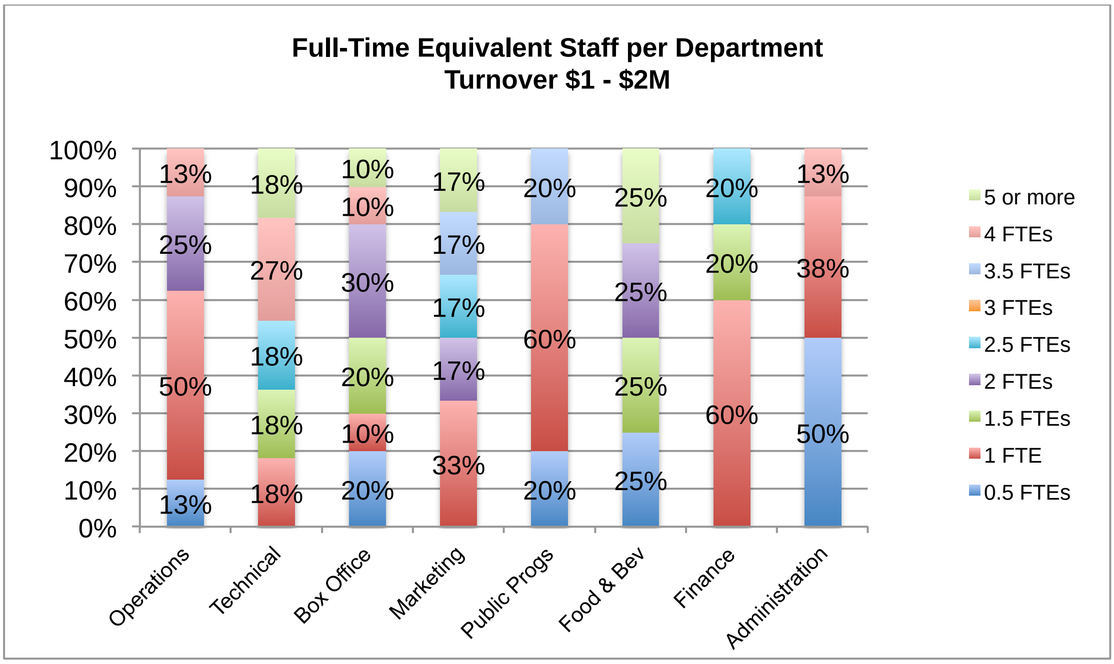


Figure 23: FTE Staff per Department – Turnover $1 to $2M

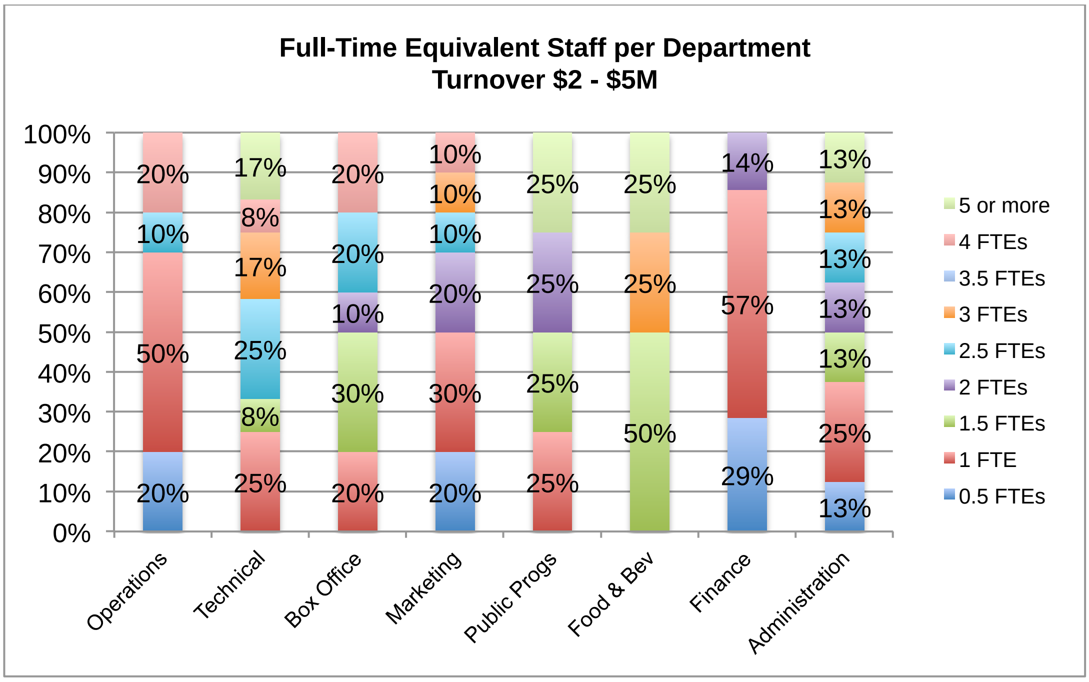


Figure 24: FTE Staff per Department – Turnover $2 to $5M

Total FTE across the 53 respondent venues and all departments provides an indication of the level of employment generated by the sector. A total of 746 people are employed across respondent venues with an average of 14 staff per venue. Figure 23 shows the spread of departments and percentage of skilled persons required on average per venue.

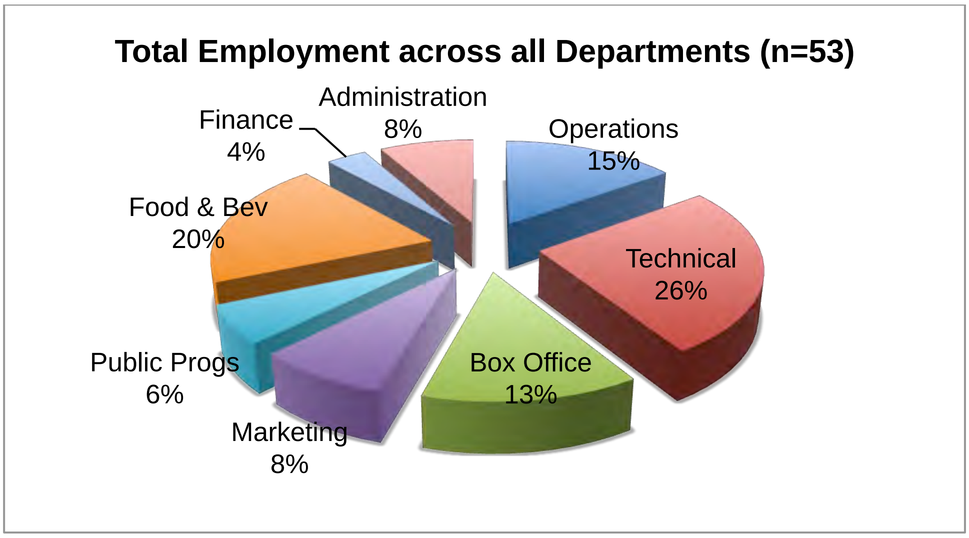


Figure 25: Total Employment in Respondent Venues

Venue Operations

Commercial Hire Rates – Primary Space

Capacity	Venue – Primary Performance Space	State	Commercial Hire (Package Rate)					Commercial Hire (Rehearsal Rate)	
			Per week	Per day	Per session	Hours per session	Vs % of Net Box Office	Per Hour	Per Day
Under 500 Seats	BEMAC - Brisbane Multicultural Arts Centre	QLD		1,200	720	4		150	1,200
	Broome Civic Centre [Shire of Broome]	WA	3,435	1,145	625	-		-	1,145
	Burnie Arts and Function Centre	TAS		695				75	
	Colac Otway Performing Arts and Cultural Centre	VIC	NA	1,400	950	4	NA	NA	1,400
	Devonport Entertainment and Convention Centre	TAS	-		-	-	8.5%	160	320
	Don Russell Performing Arts Centre	WA			610	< 8		41	
	Dubbo Regional Theatre and Convention Centre	NSW	NA	1,560	NA		10%	120	675
	Judith Wright Centre of Contemporary Arts	QLD	8,260	2,060			-		1,240
	Karralyka Centre	VIC						261	2,088
	Marion Cultural Centre	SA	14,455	1,947	825	4	NA	150	1,947
	Matt Dann Theatre & Cinema	WA	NA	855	433	4			540
	Mildura Arts Centre	VIC		1,350				83	
	Monkey Baa Theatre Company	NSW	by request	4,150	2,500	5		215	4,150
	Pilbeam Theatre	QLD		1,160			10%	75	
	Playford Civic Centre	SA	1,947	583				120	583
	Portland Arts Centre	VIC			75	1			
	QUT Gardens Theatre	QLD	17,300	3,850					
	Street Theatre	ACT	5,000						
	The Cube Wodonga	VIC		1,943	1,227	4	NA		
	The Hopgood Theatre	SA			1190	6	12.5%	4 hours	250
	Wagga Wagga Civic Theatre	NSW		2,200			12%		
	West Gippsland Arts Centre	VIC	NA	1,400	1,400	10	NA	55	NA
	Whitehorse Performing Arts Centre	VIC	NA	NA	1,500	5		150	

Capacity	Venue - Primary Performance Space	State	Commercial Hire (Package Rate)					Commercial Hire (Rehearsal Rate)	
			Per week	Per day	Per session	Hours per session	Vs % of Net Box Office	Per Hour	Per Day
500 to 999 Seats	Manning Entertainment Centre	NSW	3,600	1,000	1,000	8	10%	100	800
	Barossa Arts & Convention Centre	SA		2,500					1,350
	Brolga Theatre	QLD			920		10%	68	
	Redland Performing Arts Centre	QLD		1,209			10%	76	533
	Eastbank Centre - Riverlinks Venues	VIC		2,010					520
	Frankston Arts Centre	VIC			2,420	5		220	
	Bathurst Memorial Entertainment Centre	NSW		1,400	700	4	10%	119	700
	Albury Entertainment Centre	NSW		1,795			12%	140	
	Shoalhaven Entertainment Centre	NSW	NA	1,925	1,925	8	NA	NA	970
	Clocktower Centre	VIC			545	1		290	
	University Theatres - University of Western Australia	WA		880					440
	Orange Civic Theatre	NSW	$1246	NA	NA	NA	12.5%		
	Her Majesty's Theatre	VIC	NA	3,280		9	NA	225	1,250
	Bunbury Regional Entertainment Centre	WA		3,468		16		172	520

	Theatre Royal	TAS		1,500			12%		330
	Mandurah Performing Arts Centre	WA		2,890			n/a	158	
	The Events Centre	QLD		3,315	1,150	6		6 hrs $1150	3,315
	Cairns Civic Theatre	QLD	8,400	1,200	600	4	10%	149	1,200
	Joan Sutherland Performing Arts Centre	NSW	NA	NA	NA	NA	NA	220	NA
	Seymour Centre	NSW	38,200	8,375				Negotiable	Negotiable
	Illawarra Performing Arts Centre	NSW			1,370	5	10%	160	
	The Glasshouse Port Macquarie	NSW			1,480	4	11%	290	
	Griffith Regional Theatre	NSW			750	4	12%	65	
	Riverside Theatres Parramatta	NSW	29,459	5,509	5,509	4	10-30%	na	5,509
	Gladstone Entertainment Convention Centre	QLD			1,300	4	10%	150	
	Queens Park Theatre	WA		1,190			10%		
	Capitol Venues and Events	VIC			1,900	5		132	
	Geelong Performing Arts Centre	VIC	11,743	2,258					903
	Esperance Civic Centre	WA	NA	NA	NA	NA	NA	NA	1,600
	Ipswich Civic Centre	QLD	Negotiable	1,340	870	3	10%	140	1,260
	Melbourne Theatre Company	VIC	22,000	4,400	4,400	12			2,200
	NIDA Parade Theatres	NSW	21,000	4,700					2,200
Capacity	Venue – Primary Performance Space	State	Commercial Hire (Package Rate)					Commercial Hire (Rehearsal Rate)	
			Per week	Per day	Per session	Hours per session	Vs % of Net Box Office	Per Hour	Per Day
1,000 to 1,999 seats	His Majesty's Theatre	WA	13,500	2,700					1,060
	Empire Theatre	QLD		2,900			10%		2,900
	Canberra Theatre Centre	ACT	26,950	3,850					2,464
	Mackay Entertainment & Convention Centre	QLD		2,300	1,190	5	10%	155	1,000
	City Recital Hall Angel Place	NSW		11,499					
	Monash University Academy of Performing Arts	VIC		4,990					1,573
Over 2,000	Arts Centre Melbourne	VIC	86,865	17,373					

Commercial Hire Rates – Secondary Space

Capacity	Venue – Secondary Performance Space	State	Commercial Hire (Package Rate)					Commercial Hire (Rehearsal Rate)	
			Per week	Per day	Per session	Hours per session	Vs % of Net Box Office	Per Hour	Per Day
Under 500 seats	Albury Entertainment Centre	NSW		470					
	Barossa Arts & Convention Centre	SA		1,300					700
	BEMAC - Brisbane Multicultural Arts Centre	QLD		850	510	4		106	850
	Bunbury Regional Entertainment Centre	WA		1,575		16		236	
	Capitol Venues and Events	VIC			1,270	5		88	
	Colac Otway Performing Arts and Cultural Centre	VIC	NA	725	470	4	NA	NA	725
	Eastbank Centre - Riverlinks Venues	VIC		1,380					520
	Empire Theatre	QLD		1,100			10		1,100
	Esperance Civic Centre	WA	NA	NA	NA	NA	NA	NA	420
	Frankston Arts Centre	VIC			1,360	5		110	
	Geelong Performing Arts Centre	VIC	4,486	864					343
	Griffith Regional Theatre	NSW			140	4		65	
	His Majesty's Theatre	WA	1,800	300					300
	Illawarra Performing Arts Centre	NSW			680	5	10	115	

	Ipswich Civic Centre	QLD	Negotiable	990	330	3	10%	110	990
	Joan Sutherland Performing Arts Centre	NSW	NA	NA	NA	NA	NA	220	NA
	Judith Wright Centre of Contemporary Arts	QLD	1,650	500					230
	Mandurah Performing Arts Centre	WA		990			NA	150	
	Melbourne Theatre Company	VIC	5,500	1,100	550	6			1,100
	Mildura Arts Centre	VIC				115		115	
	NIDA Parade Theatres	NSW	6,600	1,600					850
	Queens Park Theatre	WA		310					
	Redland Performing Arts Centre	QLD		430			10	56	430
	Riverside Theatres Parramatta	NSW	7,543	1,604	1,604	4	10-30%	NA	1,604
	Shoalhaven Entertainment Centre	NSW	NA	580	290	4	NA	NA	580
	Street Theatre	ACT	1,500						
	The Glasshouse Port Macquarie	NSW			360	4			
	The Hopgood Theatre	SA			260	4		per 4 hours	260
	Theatre Royal	TAS	1,100	385					220
Capacity	Venue – Secondary Performance Space	State	Commercial Hire (Package Rate)					Commercial Hire (Rehearsal Rate)	
			Per week	Per day	Per session	Hours per session	Vs % of Net Box Office	Per Hour	Per Day
500 to 999 seats	Bathurst Memorial Entertainment Centre	NSW		1,258	677	4	10%	119	677
	Burnie Arts and Function Centre	TAS		910				75	
	Canberra Theatre Centre	ACT	15,785	2,255					1,551
	Dubbo Regional Theatre and Convention Centre	NSW		1,295		8	10%	120	620
	Orange Civic Theatre	NSW		1,010			11%		
	Seymour Centre	NSW	31,000	6,880				Negotiable	Negotiable
	University Theatres - University of Western Australia	WA		1,320					660

Capacity	Venue – Secondary Performance Space	State	Commercial Hire (Package Rate)					Commercial Hire (Rehearsal Rate)	
			Per week	Per day	Per session	Hours per session	Vs % of Net Box Office	Per Hour	Per Day
Over 1,000 seats	Mackay Entertainment & Convention Centre	QLD	NA	7,800	5,000	Day & Evening	10%	Discretional	Discretional
	Arts Centre Melbourne	VIC	88,321	17,648					

Commercial Hire Rates - Tertiary Space

Capacity	Venue – Tertiary Performance Space	State	Commercial Hire (Package Rate)					Commercial Hire (Rehearsal Rate)	
			Per week	Per day	Per session	Hours per session	Vs % of Net Box Office	Per Hour	Per Day
Under 500 seats	Bathurst Memorial Entertainment Centre	NSW		228	118	4	NA	59	228
	Canberra Theatre Centre	ACT	924	154					154
	Capitol Venues and Events	VIC			417	5		47	
	Empire Theatre	QLD		850			10%		850

	Illawarra Performing Arts Centre	NSW			330	5	10%	45	
	Joan Sutherland Performing Arts Centre	NSW	NA	NA	NA	NA	NA	88	
	Redland Performing Arts Centre	QLD		683			10	70	683
	Riverside Theatres Parramatta	NSW	5,576	1,084	1,084	4	10-30%	NA	1,084
	Seymour Centre	NSW	6,100	1,950				Negotiable	Negotiable
	Street Theatre	ACT	1,000						
	The Glasshouse Port Macquarie	NSW		350	175	4			
	University Theatres - University of Western Australia	WA		440					440
500 to 999 seats	Arts Centre Melbourne	VIC	33064	6608					
1,000 to 1,999	Geelong Performing Arts Centre	VIC	16356	3145					

Additional Performance Spaces

Capacity	Venue – Additional Performance Space	State	Commercial Hire (Package Rate)					Commercial Hire (Rehearsal Rate)	
			Per week	Per day	Per session	Hours per session	Vs % of Net Box Office	Per Hour	Per Day
Under 500 seats	Bathurst Memorial Entertainment Centre	NSW		337	169	4	NA	NA	337
	Capitol Venues and Events	VIC		217	128	4			217
	Empire Theatre	QLD		700			10%		700
	Seymour Centre	NSW	5,900	985				Negotiable	Negotiable
	Arts Centre Melbourne	VIC	13,450	2,688					
1,000 to 1,999	Illawarra Performing Arts Centre	NSW			1,900	5	10	190	

Community Rates

Almost all venues offer discounted rates for community groups, however the definition varies between centres. The following chart shows the principal types of qualifications hirers require to access these rates and the percentage of venue respondents that apply those criteria.

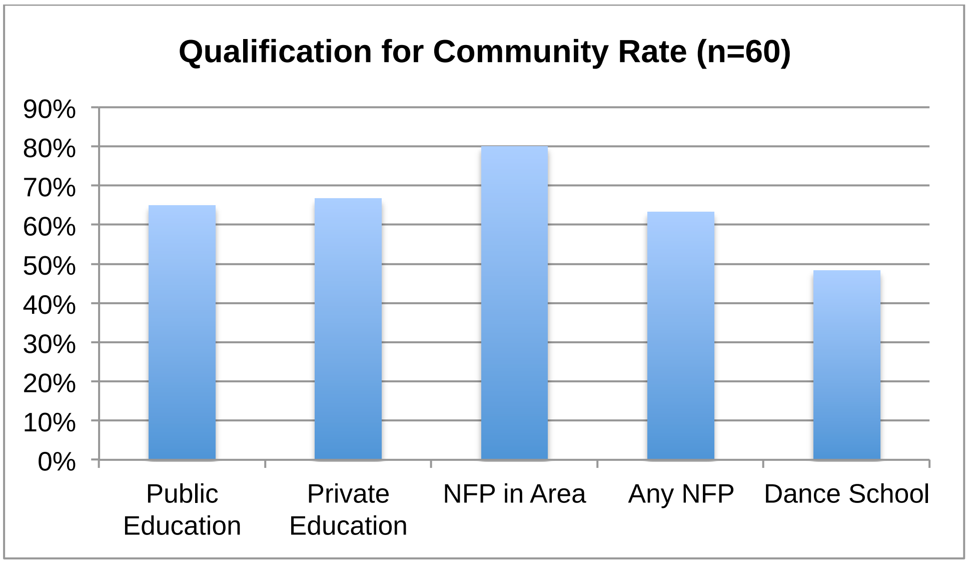


Figure 26: Qualification Criteria for Community Hire Rates

Some venues also reported providing different hire rates for specific groups in the communities including schools (18 venues), Eisteddfod groups (10 venues) and Conferences (11 venues). A number of venues advised of further discounting for specific community groups including long-term community hirers and for meetings or community events organised by the owner of their building.

Community Hire Rates - Primary Space

Capacity	Venue – Primary Performance Space	State	Commercial Hire (Package Rate)					Commercial Hire (Rehearsal Rate)	
			Per week	Per day	Per session	Hours per session	Vs % of Net Box Office	Per Hour	Per Day
Under 500 Seats	BEMAC - Brisbane Multicultural Arts Centre	QLD		600	360	4		75	600
	Broome Civic Centre [Shire of Broome]	WA	1,725	575	315	-	-	-	575
	Burnie Arts and Function Centre	TAS		278				30	
	Colac Otway Performing Arts and Cultural Centre	VIC	NA	1,050	705	4	NA	NA	1,050
	Devonport Entertainment and Convention Centre	TAS						80	160
	Don Russell Performing Arts Centre	WA			490	<8		41	
	Dubbo Regional Theatre and Convention Centre	NSW		1,275		8		90	638
	Judith Wright Centre of Contemporary Arts	QLD	6,695	1,720					995
	Karralyka Centre	VIC						193	1,544
	Marion Cultural Centre	SA	9,912	1,298	550	4	NA	100	1,298
Capacity	Venue – Primary Performance Space	State	Commercial Hire (Package Rate)					Commercial Hire (Rehearsal Rate)	
			Per week	Per day	Per session	Hours per session	Vs % of Net Box Office	Per Hour	Per Day
Under 500 Seats	Matt Dann Theatre & Cinema	WA	NA	428	214	4			
	Mildura Arts Centre	VIC		515				83	
	Monkey Baa Theatre Company	NSW	by request	2,700	1,750	5		176	2,700
	Pilbeam Theatre	QLD		620			10%	62	
	Playford Civic Centre	SA	973	292				120	292
	Portland Arts Centre	VIC			29	1			
	QUT Gardens Theatre	QLD	13,840	3,080					
	The Cube Wodonga	VIC	NA	1,538	992	4	NA	NA	335
	The Hopgood Theatre	SA			930	6		4 hours	250
	Wagga Wagga Civic Theatre	NSW		850	650	3pm-12pm		63	
	West Gippsland Arts Centre	VIC	5,160	860	860	10	NA	55	NA
	Whitehorse Performing Arts Centre	VIC			1,185	5		150	
Capacity	Venue - Primary Performance Space	State	Commercial Hire (Package Rate)					Commercial Hire (Rehearsal Rate)	
			Per week	Per day	Per session	Hours per session	Vs % of Net Box Office	Per Hour	Per Day
500 to 999 seats	Albury Entertainment Centre	NSW		1,292				95	
	Barossa Arts & Convention Centre	SA		1,350					750
	Bathurst Memorial Entertainment Centre	NSW		981	491	4	10%	96	491
	Brolga Theatre	QLD			430		8%	68	
	Bunbury Regional Entertainment Centre	WA		2,254		16		57	338
	Cairns Civic Theatre	QLD	5,650	650	324	4	10%	81	650

	Capitol Venues and Events	VIC			1,676	5		81	
	Clocktower Centre	VIC			505	1		200	
	Eastbank Centre - Riverlinks Venues	VIC		1,380					445
	Esperance Civic Centre	WA	NA	NA	NA	NA	NA	NA	1,280
	Frankston Arts Centre	VIC			1,760	5		220	
	Geelong Performing Arts Centre	VIC	10,674	2,053					822
	Gladstone Entertainment Convention Centre	QLD			520	4	10%	60	
	Griffith Regional Theatre	NSW			$400 or $2.50 / seat	4		First 4 hours free, $65 / hr	
	Her Majesty's Theatre	VIC	NA	2,560		9		225	1,250
	Illawarra Performing Arts Centre	NSW			870	5	10%	120	
	Ipswich Civic Centre	QLD	Negotiable	1,005	525	3	NA	90	720
	Joan Sutherland Performing Arts Centre	NSW	NA	NA	NA	NA	NA	110	NA
	Mandurah Performing Arts Centre	WA		2,200			NA	150	
	Manning Entertainment Centre	NSW	3,600	500	500	8	10%	100	800
	Melbourne Theatre Company	VIC	22,000	4,400	4,400	12			2,200
	NIDA Parade Theatres	NSW	15,000	3,000					1,750
	Orange Civic Theatre	NSW		$865 perf			12.5% NBO		
	Queens Park Theatre	WA		595			5%		
	Redland Performing Arts Centre	QLD		725			10%	46	320
	Riverside Theatres Parramatta	NSW	25,045	4,662	4,662	4	10-30%	NA	4,662
	Seymour Centre	NSW	Negotiable	Negotiable				Negotiable	Negotiable
	Shoalhaven Entertainment Centre	NSW	NA	935	935	8	NA	NA	385
	The Events Centre	QLD		3,015	1,108	6		6 hours	3,015
	The Glasshouse Port Macquarie	NSW			888	4		174	
	Theatre Royal	TAS		1,000					330

Capacity	Venue – Primary Performance Space	State	Commercial Hire (Package Rate)					Commercial Hire (Rehearsal Rate)	
			Per week	Per day	Per session	Hours per session	Vs % of Net Box Office	Per Hour	Per Day
More than 1,000	Canberra Theatre Centre	ACT							
	City Recital Hall Angel Place	NSW		8,440					3,874
	Empire Theatre	QLD		1,800			10%		1,800
	His Majesty's Theatre	WA	12,500	2,500					1,000
	Mackay Entertainment & Convention Centre	QLD	0	2,000	810	5	10%	155	1,000
	Monash University Academy of Performing Arts	VIC		4,670					

Community Hire Rates – Secondary Venue

Capacity	Venue – Secondary Performance Space	State	Commercial Hire (Package Rate)					Commercial Hire (Rehearsal Rate)	
			Per week	Per day	Per session	Hours per session	Vs % of Net Box Office	Per Hour	Per Day
Under 500 seats	Albury Entertainment Centre	NSW		423					
	Barossa Arts & Convention Centre	SA		700				13.4	350
	BEMAC – Brisbane Multicultural Arts Centre	QLD		425	255	4		53.15	425
	Bunbury Regional Entertainment Centre	WA		1,260		16		189	
	Capitol Venues and Events	VIC			1,118	5		81	

	Colac Otway Performing Arts and Cultural Centre	VIC	NA	620	395	4	NA	NA	620
	Eastbank Centre – Riverlinks Venues	VIC		1,020					445
	Empire Theatre	QLD		800			10%		800
	Esperance Civic Centre	WA	NA	NA	NA	NA	NA	NA	336
	Frankston Arts Centre	VIC			890	5		110	
	Geelong Performing Arts Centre	VIC	4,064	782					312
	Griffith Regional Theatre	NSW			140			65	
	His Majesty's Theatre	WA	1,800	300					300
	Illawarra Performing Arts Centre	NSW			490	5	10%	90	
	Ipswich Civic Centre	QLD	Negotiable	495	165	3	NA	55	495
	Joan Sutherland Performing Arts Centre	NSW	NA	NA	NA	NA	NA	110	NA
	Judith Wright Centre of Contemporary Arts	QLD	1,350	425					185
	Mandurah Performing Arts Centre	WA		770			NA	135	
	Melbourne Theatre Company	VIC	5,500	1,100	550	6			1,100
	Mildura Arts Centre	VIC				115		115	
	NIDA Parade Theatres	NSW	3,000	850					600
	Queens Park Theatre	WA		180					
	Redland Performing Arts Centre	QLD		172			10	22	172
	Riverside Theatres Parramatta	NSW	6,429	1,356	1,356	4	10-30%	NA	1,356
	Shoalhaven Entertainment Centre	NSW	NA	470	235	4	NA	NA	470
	Street Theatre	ACT	Negotiable						
	The Glasshouse Port Macquarie	NSW			216	4			
	The Hopgood Theatre	SA			260	4		per 4 hours	260
	Theatre Royal	TAS	990	250					110

Capacity	Venue – Secondary Performance Space	State	Commercial Hire (Package Rate)					Commercial Hire (Rehearsal Rate)	
			Per week	Per day	Per session	Hours per session	Vs % of Net Box Office	Per Hour	Per Day
500 to 999 seats	Bathurst Memorial Entertainment Centre	NSW		697	396	4	10%	96	396
	Burnie Arts and Function Centre	TAS		364				30	
	Canberra Theatre Centre	ACT							
	Dubbo Regional Theatre and Convention Centre	NSW	0	1035	0	8	0	80	517
	Orange Civic Theatre	NSW							
	Seymour Centre	NSW	Negotiable	Negotiable				Negotiable	Negotiable
	University Theatres - University of Western Australia	WA							
Over 1,000 seats	Mackay Entertainment & Convention Centre	QLD	NA	7,000	4,660	Day & Evening	10%	Discretional	Discretional

Community Hire Rates – Tertiary venue

Capacity	Venue – Tertiary Performance Space	State	Commercial Hire (Package Rate)					Commercial Hire (Rehearsal Rate)	
			Per week	Per day	Per session	Hours per session	Vs % of Net Box Office	Per Hour	Per Day
Under 500 seats	Bathurst Memorial Entertainment Centre	NSW		208	110	4	NA	52	208
	Capitol Venues and Events	VIC			605	5		56	
	Empire Theatre	QLD		630			10%		630

	Illawarra Performing Arts Centre	NSW			255	5	10%	40	
	Joan Sutherland Performing Arts Centre	NSW	NA	NA	NA	NA	NA	66	NA
	Redland Performing Arts Centre	QLD		273			10%	28	273
	Riverside Theatres Parramatta	NSW	5,001	1,035	1,035	4	10-30%	NA	1,035
	Seymour Centre	NSW	Negotiable	Negotiable				Negotiable	Negotiable
	Street Theatre	ACT	Negotiable						
	The Glasshouse Port Macquarie	NSW		210	105	4			
1,000 to 1,999	Geelong Performing Arts Centre	VIC	2,859					1,141	2,859

Community Rates – Additional Spaces

Capacity	Venue – Tertiary Performance Space	State	Commercial Hire (Package Rate)					Commercial Hire (Rehearsal Rate)	
			Per week	Per day	Per session	Hours per session	Vs % of Net Box Office	Per Hour	Per Day
Under 500 seats	Bathurst Memorial Entertainment Centre	NSW		312	156	4	N/A	N/A	312
	Capitol Venues and Events	VIC	642	115	75	4	0	0	115
	Empire Theatre	QLD		550			10		550
	Seymour Centre	NSW	Negotiable	Negotiable				Negotiable	Negotiable
1,000 to 1,999	Illawarra Performing Arts Centre	NSW			1500	5	10	150	

Hire Package Inclusions

There is very little difference between commercial and community hire package inclusions. Most packages have similar inclusions for both commercial and community hirers. Differences are seen in the inclusion of duty managers and technical staff for community hirers. The following chart shows the percentage of respondents that include each specific charge within their overall hire fee.

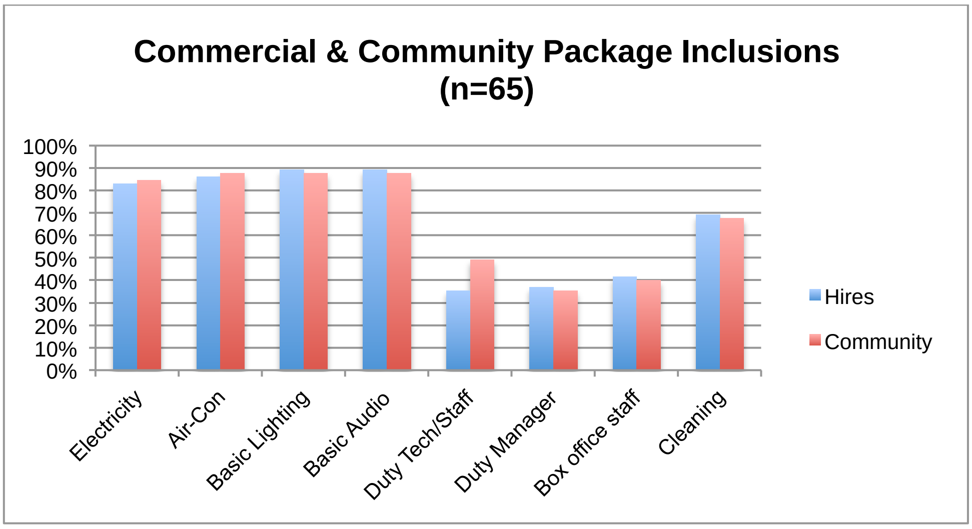


Figure 27: Hire Package Inclusions – Commercial –v- Community

Almost one-third of venues respondents (72%) provide basic marketing advice to hirers of the venue at no additional charge.   This result is a significant change from the 2013 survey where 54% of venues provided this support at no additional cost.

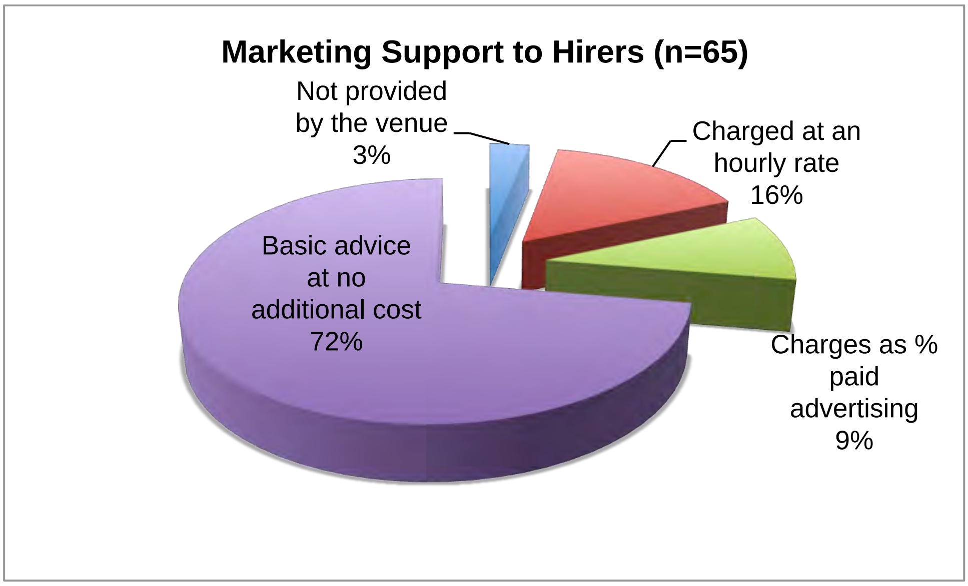


Figure 28: Marketing Services for Hirers

The treatment of cleaning charges has changed between 1%-5% for most categories allowing for a doubling of the percentage of venues (from 7% in 2013 to 14% in 2015) charging cleaning at a flat rate of between $150 and $300.

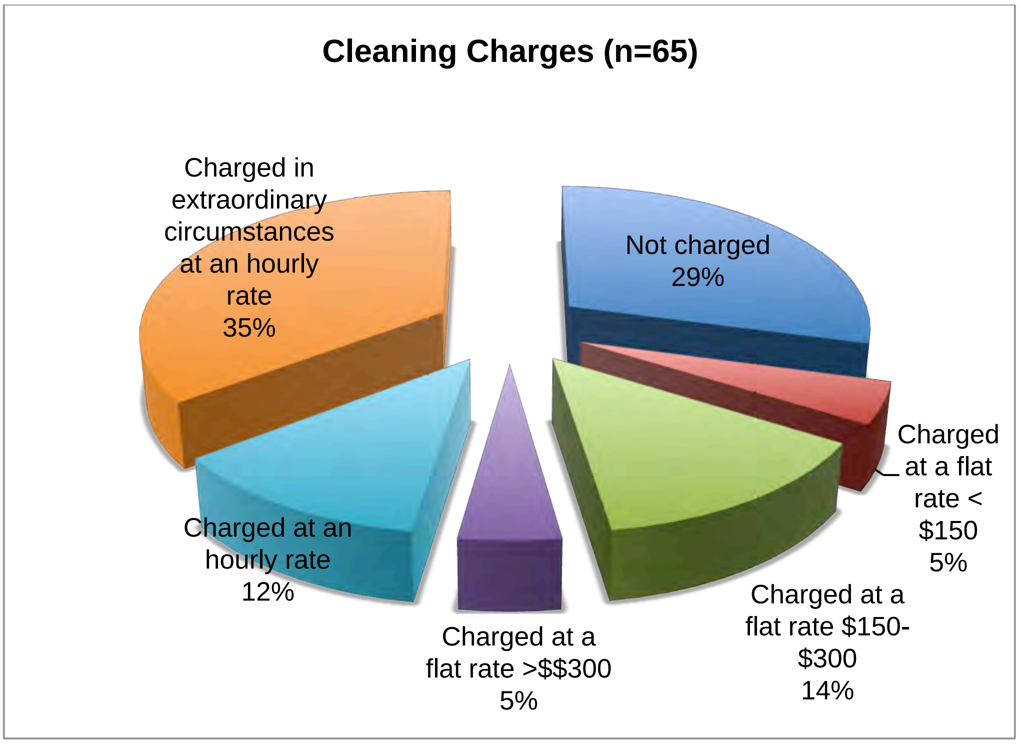


Figure 29: Cleaning Charges

Staff Charge Out and Minimum Staffing

The following tables are set out by state rather than audience capacity as hirer and owner comparisons are often made in a geographical area. Further, a number of centres use state industrial awards, making comparison based on jurisdiction more appropriate.

Staff Charge Out Rates

Venue	State	Duty Manager		Usher		Merch Seller		Box Office		Stage Door	
		Rate $/hr	Min.Call	Rate $/hr	Min.Call	Rate $/hr	Min.Call	Rate $/hr	Min.Call	Rate $/hr	Min.Call
Canberra Theatre Centre	ACT	$60-$64.90	4 hrs	$35-$39.90	4 hrs	$35-$39.90	4 hrs	$45-$49.90	4 hrs	$35-$39.90	4 hrs
Street Theatre	ACT	$35-$39.90	4 hrs			$20-$24.90	4 hrs	$30-$34.90	4 hrs		
Albury Entertainment Centre	NSW			$30-$34.90	3 hrs	$30-$34.90	3 hrs	$35-$39.90	2 hrs		
Bathurst Memorial Entertainment Centre	NSW	$40-$44.90	1 hr	<$20	1 hr	$40-$44.90	1 hr	$40-$44.90	1 hr		
City Recital Hall Angel Place	NSW	$50-$54.90	3 hrs	$40-$44.90	3 hrs	$40-$44.90	3 hrs	$40-$44.90	3 hrs	$40-$44.90	4 hrs
Dubbo Regional Theatre and Convention Centre	NSW			$25-$29.90	3 hrs	$25-$29.90	3 hrs			$55-$59.90	3 hrs
Griffith Regional Theatre	NSW	$45-$49.90	3 hrs	$40-$44.90	2 hrs	$40-$44.90	2 hrs				
Illawarra Performing Arts Centre	NSW	$45-$49.90	3 hrs	$35-$39.90	3 hrs	$35-$39.90	3 hrs	$40-$44.90	3 hrs		
Joan Sutherland Performing Arts Centre	NSW	$40-$44.90	3 hrs	$35-$39.90	3 hrs	$35-$39.90	3 hrs	$35-$39.90	3 hrs	$35-$39.90	3 hrs
Manning Entertainment Centre	NSW	$40-$44.90	4 hrs			$40-$44.90	3 hrs	$40-$44.90	3 hrs		
Monkey Baa Theatre Company	NSW	$35-$39.90	4 hrs	$35-$39.90	4 hrs	$35-$39.90	3 hrs	$35-$39.90	4 hrs	$35-$39.90	4 hrs
NIDA Parade Theatres	NSW	$35-$39.90	3 hrs	$35-$39.90	3 hrs	$35-$39.90	3 hrs	$35-$39.90	3 hrs	$35-$39.90	3 hrs
Orange Civic Theatre	NSW					$30-$34.90	2 hrs				
Riverside Theatres Parramatta	NSW	$45-$49.90	4 hrs	$45-$49.90	4 hrs	$45-$49.90	4 hrs			$45-$49.90	4 hrs
Seymour Centre	NSW					$30-$34.90	4 hrs				
Shoalhaven Entertainment Centre	NSW	$55-$59.90	2 hrs	$55-$59.90	2 hrs	$55-$59.90	1 hr	$55-$59.90	2 hrs	$55-$59.90	3 hrs
The Glasshouse Port Macquarie	NSW	$50-$54.90	3 hrs	$45-$49.90	3 hrs	$45-$49.90	3 hrs				
Wagga Wagga Civic Theatre	NSW	$45-$49.90	3 hrs	$35-$39.90	3 hrs	$35-$39.90	3 hrs	$35-$39.90	3 hrs		
BEMAC - Brisbane Multicultural Arts Centre	QLD	$25-$29.90	4 hrs	$20-$24.90	4 hrs	$20-$24.90	4 hrs	$25-$29.90	4 hrs	$20-$24.90	4 hrs
Brisbane Powerhouse	QLD	$40-$44.90	4 hrs	$35-$39.90	4 hrs	$40-$44.90	4 hrs	$40-$44.90	4 hrs		
Brolga Theatre	QLD	$50-$54.90	4 hrs								
Cairns Civic Theatre	QLD	$50-$54.90	3 hrs	$40-$44.90	3 hrs	$40-$44.90	3 hrs	$45-$49.90	3 hrs	$55-$59.90	3 hrs
Empire Theatre	QLD	$50-$54.90				$50-$54.90					
Gladstone Entertainment Convention Centre	QLD	$55-$59.90	3 hrs	> $65	1 hr	$55-$59.90	3 hrs	$55-$59.90	3 hrs		
Judith Wright Centre of Contemporary Arts	QLD	$45-$49.90	4 hrs	$45-$49.90	3 hrs	$45-$49.90	3 hrs	$45-$49.90	3 hrs		
Lake Kawana Community Centre	QLD	$45-$49.90	3 hrs	$45-$49.90	3 hrs	$45-$49.90	3 hrs	$45-$49.90	3 hrs	$45-$49.90	3 hrs
Mackay Entertainment & Convention Centre	QLD	$55-$59.90	2 hrs	$55-$59.90	2 hrs	$55-$59.90	2 hrs	$55-$59.90	2 hrs		
Pilbeam Theatre	QLD	$60-$64.90	3 hrs			$45-$49.90	3 hrs				
QUT Gardens Theatre	QLD	$55-$59.90	3 hrs	$45-$49.90	3 hrs	$45-$49.90	3 hrs	$45-$49.90	3 hrs		
Redland Performing Arts Centre	QLD	$50-$54.90	3 hrs	$35-$39.90	3 hrs	$35-$39.90	3 hrs				

Venue	State	Duty Manager		Usher		Merch Seller		Box Office		Stage Door	
		Rate $/hr	Min.Call	Rate $/hr	Min.Call	Rate $/hr	Min.Call	Rate $/hr	Min.Call	Rate $/hr	Min.Call
The Events Centre	QLD	$50-$54.90	2 hrs	$50-$54.90	2 hrs	$50-$54.90	2 hrs	$50-$54.90	2 hrs	$50-$54.90	2 hrs
Barossa Arts & Convention Centre	SA	$45-$49.90	1 hr	<$20	1 hr	$45-$49.90	1 hr	<$20	1 hr	<$20	1 hr
Marion Cultural Centre	SA	$50-$54.90	3 hrs	$50-$54.90	3 hrs	$50-$54.90	3 hrs	$50-$54.90	3 hrs	$50-$54.90	3 hrs
The Hopgood Theatre	SA	$45-$49.90	3 hrs	$35-$39.90	3 hrs	$35-$39.90	3 hrs	$30-$34.90	3 hrs	$35-$39.90	3 hrs
Burnie Arts and Function Centre	TAS	$40-$44.90	3 hrs	$40-$44.90	2 hrs	$40-$44.90	2 hrs	$40-$44.90	2 hrs	$40-$44.90	2 hrs
Devonport Entertainment and Convention Centre	TAS	$35-$39.90	3 hrs	$35-$39.90	3 hrs	$35-$39.90	3 hrs	$35-$39.90	3 hrs	$35-$39.90	3 hrs
Theatre Royal	TAS	$35-$39.90	3 hrs	$35-$39.90	3 hrs	$35-$39.90	3 hrs				
Arts Centre Melbourne	VIC	$35-$39.90	4 hrs	$25-$29.90	3 hrs	$25-$29.90	3 hrs				
Capitol Venues and Events	VIC	$45-$49.90	3 hrs	$45-$49.90	3 hrs	$45-$49.90	3 hrs	$45-$49.90	3 hrs	$45-$49.90	3 hrs
Clocktower Centre	VIC	$55-$59.90	4 hrs	$50-$54.90	4 hrs	$50-$54.90	4 hrs				
Colac Otway Performing Arts and Cultural Centre	VIC	$60-$64.90	3 hrs	$60-$64.90	3 hrs	$60-$64.90	3 hrs				
Eastbank Centre - Riverlinks Venues	VIC	$45-$49.90	4 hrs	$40-$44.90	3 hrs	$40-$44.90	2 hrs				
Frankston Arts Centre	VIC	$55-$59.90	3 hrs	$45-$49.90	3 hrs	$45-$49.90	3 hrs				
Geelong Performing Arts Centre	VIC	$40-$44.90	3 hrs	$35-$39.90	3 hrs	$25-$29.90		$40-$44.90	3 hrs	$35-$39.90	3 hrs
Her Majesty's Theatre	VIC	$45-$49.90	2 hrs	$40-$44.90	2 hrs	$40-$44.90	2 hrs	$45-$49.90	2 hrs	$40-$44.90	2 hrs
Karralyka Centre	VIC	$40-$44.90	3 hrs	$40-$44.90	2 hrs	$40-$44.90	2 hrs	$40-$44.90	2 hrs		
Melbourne Theatre Company	VIC	$40-$44.90	4 hrs	$35-$39.90	3 hrs	$35-$39.90	3 hrs				
Mildura Arts Centre	VIC	$55-$59.90		$45-$49.90	3 hrs	$45-$49.90	3 hrs	$45-$49.90	3 hrs	$45-$49.90	3 hrs
Monash University Academy of Performing Arts	VIC	$50-$54.90	3 hrs	$40-$44.90	2 hrs	$40-$44.90	2 hrs	$50-$54.90	3 hrs	$45-$49.90	3 hrs
Portland Arts Centre	VIC			$35-$39.90	1 hr	$35-$39.90	1 hr	$35-$39.90	1 hr	$35-$39.90	1 hr
The Cube Wodonga	VIC	$45-$49.90	3 hrs	$40-$44.90	2 hrs	$40-$44.90	2 hrs	$40-$44.90	2 hrs	$40-$44.90	2 hrs
West Gippsland Arts Centre	VIC	$50-$54.90	3 hrs	$45-$49.90	3 hrs	$45-$49.90	3 hrs				
Whitehorse Performing Arts Centre	VIC			$35-$39.90	4 hrs	$35-$39.90	1 hr				
Broome Civic Centre [Shire of Broome]	WA	> $65	1 hr	> $65	1 hr	> $65	1 hr	> $65	1 hr	> $65	1 hr
Bunbury Regional Entertainment Centre	WA	$55-$59.90	4 hrs			$55-$59.90	1 hr				
Don Russell Performing Arts Centre	WA	$40-$44.90	3 hrs					$35-$39.90	3 hrs		
Esperance Civic Centre	WA	$55-$59.90	2 hrs			$55-$59.90	2 hrs				
His Majesty's Theatre	WA	$50-$54.90	4 hrs	$35-$39.90	4 hrs	$35-$39.90	4 hrs			$40-$44.90	4 hrs
Mandurah Performing Arts Centre	WA	$45-$49.90	4 hrs	$35-$39.90	3 hrs						

Venue	State	Duty Manager		Usher		Merch Seller		Box Office		Stage Door	
		Rate $/hr	Min.Call	Rate $/hr	Min.Call	Rate $/hr	Min.Call	Rate $/hr	Min.Call	Rate $/hr	Min.Call
Matt Dann Theatre & Cinema	WA	$50-$54.90	1 hr	$50-$54.90	1 hr	$50-$54.90	1 hr	$50-$54.90	1 hr	$50-$54.90	1 hr
Queens Park Theatre	WA	$45-$49.90	3 hrs	$35-$39.90	3 hrs	$35-$39.90	3 hrs	$35-$39.90	3 hrs	$35-$39.90	3 hrs
University Theatres - University of Western Australia	WA	$45-$49.90	4 hrs	$35-$39.90	4 hrs	$35-$39.90	4 hrs	$35-$39.90	4 hrs		

Minimum Staffing Levels

Venue	State	Minimum FOH Staffing Levels NOT included in Hire Charges							
		Theatre Performances				Unticketed Events			
		Duty Manager	Ushers	Ticket Seller	Stage Door	Duty Manager	Ushers	Ticket Seller	Stage Door
Canberra Theatre Centre	ACT	1	8	2	1	1	8	-	1
Street Theatre	ACT	1	2			1	2		
Albury Entertainment Centre	NSW	1	4	1		1	4	1	
Bathurst Memorial Entertainment Centre	NSW	1	3	1	-	1	2	-	-
City Recital Hall Angel Place	NSW	1	>8		1	1	4		1
Dubbo Regional Theatre and Convention Centre	NSW		4		1				
Griffith Regional Theatre	NSW	1	2			1	1		
Illawarra Performing Arts Centre	NSW	1	2			1	2		
Joan Sutherland Performing Arts Centre	NSW	1	2	1	-	1	1	-	-
Manning Entertainment Centre	NSW	1	8	1	-	1	2	-	-
Monkey Baa Theatre Company	NSW	1	1			1	1		
NIDA Parade Theatres	NSW	1	6	1	1	1	6	-	1
Riverside Theatres Parramatta	NSW	1	2		1	1	2		1
Seymour Centre	NSW	1	4	2	1	1	4		1
Shoalhaven Entertainment Centre	NSW	1	2	1	1	1	1	-	1
The Glasshouse Port Macquarie	NSW	1	4			1			
Wagga Wagga Civic Theatre	NSW	1	3	-	-	1			-
BEMAC - Brisbane Multicultural Arts Centre	QLD	-	2	1	>1	-	-	-	-
Brolga Theatre	QLD	1	4	1	>1	1	4	-	>1
Cairns Civic Theatre	QLD	1	2	1	-	1	2	-	-
Empire Theatre	QLD	1	6		1	1	6		1
Gladstone Entertainment Convention Centre	QLD	1	1	1	-	1	1	-	-
Judith Wright Centre of Contemporary Arts	QLD	1	1	1		1	1		
Lake Kawana Community Centre	QLD	1	3	1	-	1	3	-	-
Mackay Entertainment & Convention Centre	QLD	1	2	1	-	1	2	-	-
Pilbeam Theatre	QLD	1	4	1	-	1	2	-	-
QUT Gardens Theatre	QLD	1	2	1	-	1	-	-	-
Redland Performing Arts Centre	QLD	1	4			1	4		
The Events Centre	QLD	1	2	1		1	1		
Barossa Arts & Convention Centre	SA	1	-	-	-	1	-		-
Marion Cultural Centre	SA	1				1			
The Hopgood Theatre	SA	1	3	-	>1	1	2	-	>1
Burnie Arts and Function Centre	TAS	1	2	1	-	1	1	-	-
Devonport Entertainment and Convention Centre	TAS	1	3	1	1	1	3	1	1
Theatre Royal	TAS	1	4			1	4		
Arts Centre Melbourne	VIC	1	>8						
Capitol Venues and Events	VIC	1	-	1	-	1	-	-	-
Clocktower Centre	VIC	1	4	-	-	1	4	-	-
Colac Otway Performing Arts and Cultural Centre	VIC	1	1			1			
Eastbank Centre - Riverlinks Venues	VIC	1	4	1		1	4		
Frankston Arts Centre	VIC	1	1	1		1	1		

Venue	State	Minimum FOH Staffing Levels NOT included in Hire Charges							
		Theatre Performances				Unticketed Events			
		Duty Manager	Ushers	Ticket Seller	Stage Door	Duty Manager	Ushers	Ticket Seller	Stage Door
Geelong Performing Arts Centre	VIC	1	6	1	1	1	6		1
Her Majesty's Theatre	VIC	1	3	1	1	1	3	-	1
Karralyka Centre	VIC	1	2	1	-	1	2	-	-
Melbourne Theatre Company	VIC	1	5			1	5		
Mildura Arts Centre	VIC	1	2	1	-	1	2	-	-
Monash University Academy of Performing Arts	VIC	1	5			1	5		
Portland Arts Centre	VIC			2	1		1		1
The Cube Wodonga	VIC	1	1	1	-	1	1	-	-
West Gippsland Arts Centre	VIC	1	2			1	2		
Whitehorse Performing Arts Centre	VIC		4				4		
Broome Civic Centre [Shire of Broome]	WA	1	1	1	-	-	-	-	-
Don Russell Performing Arts Centre	WA			1				1	
Esperance Civic Centre	WA	1	2	1		1	2		
His Majesty's Theatre	WA	1	>8		1	1	-		1
Mandurah Performing Arts Centre	WA	1	4	-	-	1	4	-	-
Matt Dann Theatre & Cinema	WA	1	-	1	-	1			
Queens Park Theatre	WA	1	2	1	-	1	2	-	-
University Theatres - University of Western Australia	WA	1	7	1		1	5	-	

Venue	State	Technical Manager		Duty Technician		Senior Technician		Technician	
		Rate $/hr	Min Call	Rate $/hr	Min Call	Rate $/hr	Min Call	Rate $/hr	Min Call
Canberra Theatre Centre	ACT			$45-$49.90	4 hrs	$45-$49.90	4 hrs	$45-$49.90	4 hrs
Street Theatre	ACT	$35-$39.90	4 hrs	$35-$39.90	4 hrs				
Albury Entertainment Centre	NSW	$50-$54.90	1 hr	$50-$54.90	1 hr	$50-$54.90	1 hr	$50-$54.90	1 hr
Bathurst Memorial Entertainment Centre	NSW	$40-$44.90	2 hrs	$40-$44.90	2 hrs	$40-$44.90	2 hrs	$40-$44.90	2 hrs
City Recital Hall Angel Place	NSW			$50-$54.90	4 hrs	$50-$54.90	4 hrs	$50-$54.90	4 hrs
Dubbo Regional Theatre and Convention Centre	NSW			$55-$59.90	3 hrs				
Griffith Regional Theatre	NSW	$55-$59.90		$55-$59.90		$50-$54.90		$40-$44.90	
Illawarra Performing Arts Centre	NSW			$50-$54.90	4 hrs			$45-$49.90	4 hrs
Joan Sutherland Performing Arts Centre	NSW	$55-$59.90	3 hrs	$55-$59.90	3 hrs	$55-$59.90	3 hrs	$55-$59.90	3 hrs
Manning Entertainment Centre	NSW			$40-$44.90	4 hrs				
Monkey Baa Theatre Company	NSW	$40-$44.90	4 hrs	$35-$39.90	4 hrs	$35-$39.90	4 hrs	$35-$39.90	4 hrs
NIDA Parade Theatres	NSW	$40-$44.90	3 hrs	$35-$39.90	3 hrs	$35-$39.90	3 hrs	$35-$39.90	3 hrs
Orange Civic Theatre	NSW			$55-$59.90	3 hrs				
Riverside Theatres Parramatta	NSW	$45-$49.90	4 hrs	$45-$49.90	4 hrs	$45-$49.90	4 hrs	$45-$49.90	4 hrs
Shoalhaven Entertainment Centre	NSW			$55-$59.90	3 hrs				
The Glasshouse Port Macquarie	NSW			$50-$54.90	3 hrs	$50-$54.90	3 hrs	$50-$54.90	3 hrs
Wagga Wagga Civic Theatre	NSW			$45-$49.90	3 hrs	$35-$39.90	3 hrs	$35-$39.90	3 hrs

Venue	State	Technical Manager		Duty Technician		Senior Technician		Technician	
		Rate $/hr	Min Call	Rate $/hr	Min Call	Rate $/hr	Min Call	Rate $/hr	Min Call
BEMAC - Brisbane Multicultural Arts Centre	QLD	$45-$49.90	4 hrs	$45-$49.90	4 hrs	$50-$54.90	4 hrs	$45-$49.90	4 hrs
Brisbane Powerhouse	QLD		4 hrs		4 hrs		4 hrs		4 hrs
Brolga Theatre	QLD							$50-$54.90	
Cairns Civic Theatre	QLD			$55-$59.90	3 hrs				
Empire Theatre	QLD	$50-$54.90		$50-$54.90		$50-$54.90		$50-$54.90	
Gladstone Entertainment Convention Centre	QLD	$55-$59.90	3 hrs	$55-$59.90	3 hrs	$55-$59.90	3 hrs	$55-$59.90	3 hrs
Judith Wright Centre of Contemporary Arts	QLD			$45-$49.90	4 hrs	$45-$49.90	4 hrs	$45-$49.90	4 hrs
Lake Kawana Community Centre	QLD	$45-$49.90	3 hrs	$45-$49.90	3 hrs	$45-$49.90	3 hrs	$45-$49.90	3 hrs
Lake Kawana Community Centre	QLD		3 hrs		3 hrs		3 hrs		3 hrs
Mackay Entertainment & Convention Centre	QLD	$55-$59.90	2 hrs	$55-$59.90	2 hrs	$55-$59.90	2 hrs	$55-$59.90	2 hrs
Pilbeam Theatre	QLD	$60-$64.90	3 hrs	$60-$64.90	3 hrs	$60-$64.90	3 hrs	$60-$64.90	3 hrs
QUT Gardens Theatre	QLD	> $65	1 hr	$60-$64.90	3 hrs	$55-$59.90	3 hrs	$45-$49.90	3 hrs
Redland Performing Arts Centre	QLD	$50-$54.90	3 hrs	$50-$54.90	3 hrs			$50-$54.90	3 hrs
The Events Centre	QLD	$50-$54.90	2 hrs	$50-$54.90	2 hrs	$50-$54.90	2 hrs	$50-$54.90	2 hrs
Barossa Arts & Convention Centre	SA			$60-$64.90	1 hr				
Marion Cultural Centre	SA			$50-$54.90	3 hrs				
Playford Civic Centre	SA	$40-$44.90	3 hrs					$40-$44.90	3 hrs
The Hopgood Theatre	SA	$50-$54.90	1 hr	$40-$44.90	3 hrs	$45-$49.90	3 hrs	$30-$34.90	3 hrs
Burnie Arts and Function Centre	TAS	$45-$49.90	2 hrs	$45-$49.90	2 hrs	$45-$49.90	2 hrs	$45-$49.90	2 hrs
Devonport Entertainment and Convention Centre	TAS	$40-$44.90	3 hrs					$35-$39.90	3 hrs
Theatre Royal	TAS	$40-$44.90	3 hrs	$40-$44.90	3 hrs	$40-$44.90	3 hrs	$40-$44.90	3 hrs
Arts Centre Melbourne	VIC	$50-$54.90	4 hrs	$45-$49.90	4 hrs	$45-$49.90	4 hrs	$40-$44.90	4 hrs
Capitol Venues and Events	VIC			$45-$49.90	3 hrs				
Clocktower Centre	VIC					$55-$59.90	4 hrs	$50-$54.90	4 hrs
Colac Otway Performing Arts and Cultural Centre	VIC	$60-$64.90	3 hrs	$60-$64.90	3 hrs	$60-$64.90	3 hrs	$60-$64.90	3 hrs
Eastbank Centre - Riverlinks Venues	VIC	$45-$49.90	4 hrs	$45-$49.90	4 hrs	$45-$49.90	4 hrs	$45-$49.90	4 hrs
Frankston Arts Centre	VIC	$55-$59.90	3 hrs	$55-$59.90	3 hrs	$55-$59.90	3 hrs	$55-$59.90	3 hrs
Geelong Performing Arts Centre	VIC							$40-$44.90	3 hrs
Her Majesty's Theatre	VIC	$50-$54.90	3 hrs	$45-$49.90	3 hrs	$45-$49.90	3 hrs	$40-$44.90	3 hrs
Karralyka Centre	VIC	$40-$44.90	3 hrs	$40-$44.90	2 hrs	$40-$44.90	2 hrs	$40-$44.90	2 hrs
Melbourne Theatre Company	VIC			$50-$54.90	4 hrs	$50-$54.90	4 hrs	$45-$49.90	4 hrs
Mildura Arts Centre	VIC			$55-$59.90	3 hrs				

Venue	State	Technical Manager		Duty Technician		Senior Technician		Technician	
		Rate $/hr	Min Call	Rate $/hr	Min Call	Rate $/hr	Min Call	Rate $/hr	Min Call
Monash University Academy of Performing Arts	VIC	$50-$54.90	3 hrs	$50-$54.90	3 hrs	$55-$59.90	3 hrs	$50-$54.90	3 hrs
Portland Arts Centre	VIC			$40-$44.90	1 hr				
The Cube Wodonga	VIC	$45-$49.90	2 hrs	$45-$49.90	3 hrs	$45-$49.90	2 hrs	$45-$49.90	2 hrs
West Gippsland Arts Centre	VIC	$50-$54.90	3 hrs	$50-$54.90	3 hrs	$50-$54.90	3 hrs	$45-$49.90	3 hrs
Whitehorse Performing Arts Centre	VIC			$45-$49.90	4 hrs			$35-$39.90	4 hrs
Broome Civic Centre [Shire of Broome]	WA	> $65	1 hr	> $65	1 hr	> $65	1 hr	> $65	1 hr
Bunbury Regional Entertainment Centre	WA			$55-$59.90	4 hrs	$55-$59.90	4 hrs	$55-$59.90	4 hrs
Don Russell Performing Arts Centre	WA			$40-$44.90	3 hrs			$40-$44.90	3 hrs
Esperance Civic Centre	WA			$55-$59.90	4 hrs				
His Majesty's Theatre	WA			$50-$54.90	4 hrs			$40-$44.90	4 hrs
Mandurah Performing Arts Centre	WA	$45-$49.90	3 hrs	$45-$49.90	3 hrs				
Matt Dann Theatre & Cinema	WA	> $65	1 hr	$50-$54.90	1 hr	$50-$54.90	1 hr	$50-$54.90	1 hr
Queens Park Theatre	WA	$35-$39.90	3 hrs	$35-$39.90	3 hrs	$45-$49.90	1 hr	$35-$39.90	3 hrs
University Theatres - University of Western Australia	WA	$60-$64.90	4 hrs	$50-$54.90	4 hrs	$50-$54.90	4 hrs	$40-$44.90	4 hrs

Venue	State	Min. Production Staff for Events per Performance		Overtime Penalties	
		Theatre Performances	Unticketed event	Included	Extra
Canberra Theatre Centre	ACT	1 per department	1 per department		✓
Street Theatre	ACT	1	1	✓	
Albury Entertainment Centre	NSW	2	2	✓	
Bathurst Memorial Entertainment Centre	NSW	1	1		✓
City Recital Hall Angel Place	NSW	2	2		✓
Dubbo Regional Theatre and Convention Centre	NSW	1 per department	1 but included in base hire	✓	
Griffith Regional Theatre	NSW	1 but included in base hire	1 but included in base hire		✓
Illawarra Performing Arts Centre	NSW	1 per department	1 per department		✓
Joan Sutherland Performing Arts Centre	NSW	1 per department	1 per department	✓	
Manning Entertainment Centre	NSW	1 per department	1 per department		✓
Monkey Baa Theatre Company	NSW	1 but included in base hire	1 but included in base hire		✓
NIDA Parade Theatres	NSW	1 per department	1 per department		✓
Orange Civic Theatre	NSW	1 but included in base hire	1 but included in base hire	✓	
Riverside Theatres Parramatta	NSW	1 per department	1 per department		✓
Seymour Centre	NSW	1 but included in base hire	1 but included in base hire		✓
Shoalhaven Entertainment Centre	NSW	1 per department	1 per department		✓
The Glasshouse Port Macquarie	NSW	1 but included in base hire	-		✓
Wagga Wagga Civic Theatre	NSW	2	1		✓
BEMAC - Brisbane Multicultural Arts Centre	QLD	1 per department	1 per department		✓
Brisbane Powerhouse	QLD	1 per department	1 per department		✓
Brolga Theatre	QLD	1 but included in base hire	1 but included in base hire		✓
Cairns Civic Theatre	QLD	1	1	✓	
Empire Theatre	QLD	1	1		✓

Venue	State	Min. Production Staff for Events per Performance		Overtime Penalties	
		Theatre Performances	Unticketed event	Included	Extra
Gladstone Entertainment Convention Centre	QLD	1	1	✓	
Judith Wright Centre of Contemporary Arts	QLD	3	2		✓
Lake Kawana Community Centre	QLD	4	2	✓	
Mackay Entertainment & Convention Centre	QLD	1 but included in base hire	1 but included in base hire	✓	
Pilbeam Theatre	QLD	1	1	✓	
QUT Gardens Theatre	QLD	1 per department	1 per department		✓
Redland Performing Arts Centre	QLD	3	3		✓
The Events Centre	QLD	2	2		✓
Barossa Arts & Convention Centre	SA	1	1	✓	
Marion Cultural Centre	SA	1 but included in base hire	1 but included in base hire		✓
Playford Civic Centre	SA	1 but included in base hire		✓	
The Hopgood Theatre	SA	1 but included in base hire	1 but included in base hire		✓
Burnie Arts and Function Centre	TAS	1	1	✓	
Devonport Entertainment and Convention Centre	TAS	1	1		✓
Theatre Royal	TAS	2	2		✓
Arts Centre Melbourne	VIC	> 4			✓
Capitol Venues and Events	VIC	1 per department	1 per department		✓
Clocktower Centre	VIC	2	2		✓
Colac Otway Performing Arts and Cultural Centre	VIC	1 but included in base hire	1 but included in base hire		✓
Eastbank Centre - Riverlinks Venues	VIC	1 but included in base hire	1 but included in base hire	✓	
Frankston Arts Centre	VIC	1 but included in base hire	1 but included in base hire		✓
Geelong Performing Arts Centre	VIC	3	3		✓
Her Majesty's Theatre	VIC	1 per department	1 per department		✓
Karralyka Centre	VIC	2	2		✓
Melbourne Theatre Company	VIC	1 per department	1 per department		✓
Mildura Arts Centre	VIC	1	1	✓	
Monash University Academy of Performing Arts	VIC	3	3		✓
Portland Arts Centre	VIC	1	1	✓	
The Cube Wodonga	VIC	1 but included in base hire	1 but included in base hire		✓
West Gippsland Arts Centre	VIC	1 per department	1 per department		✓
Whitehorse Performing Arts Centre	VIC	1	1		✓
Broome Civic Centre [Shire of Broome]	WA	1	1	✓	
Bunbury Regional Entertainment Centre	WA	2	2	✓	
Don Russell Performing Arts Centre	WA	1 per department	1	✓	
Esperance Civic Centre	WA	1 but included in base hire	1 but included in base hire	✓	
His Majesty's Theatre	WA	1 per department	1 per department		✓
Mandurah Performing Arts Centre	WA	2	2		✓
Matt Dann Theatre & Cinema	WA	1 per department	1 per department		✓
Queens Park Theatre	WA	1 per department	1 per department		✓
University Theatres - University of Western Australia	WA	1 per department	1 per department		✓

Ticketing Operations

There is an increase in the options available to respondent venues to source software and external agencies to provide ticketing operations. In 2013, the most popular systems were reported as Provenue/Tickets.com at 35% and SABO/Seat Advisor at 36%. The 2015 results show an increase by 2.2% in use of SABO/Seat Advisor and a reduction by over half for ProVenue/Tickets.com to 15.8%. New entrants to this market include TicketServ, PatronBase and Try Booking.

About 20% of respondents reported using multiple systems with a primary system for program inventory and secondary systems also available at their box office. Approximately one sixth of respondents (15.7%) use external agencies.

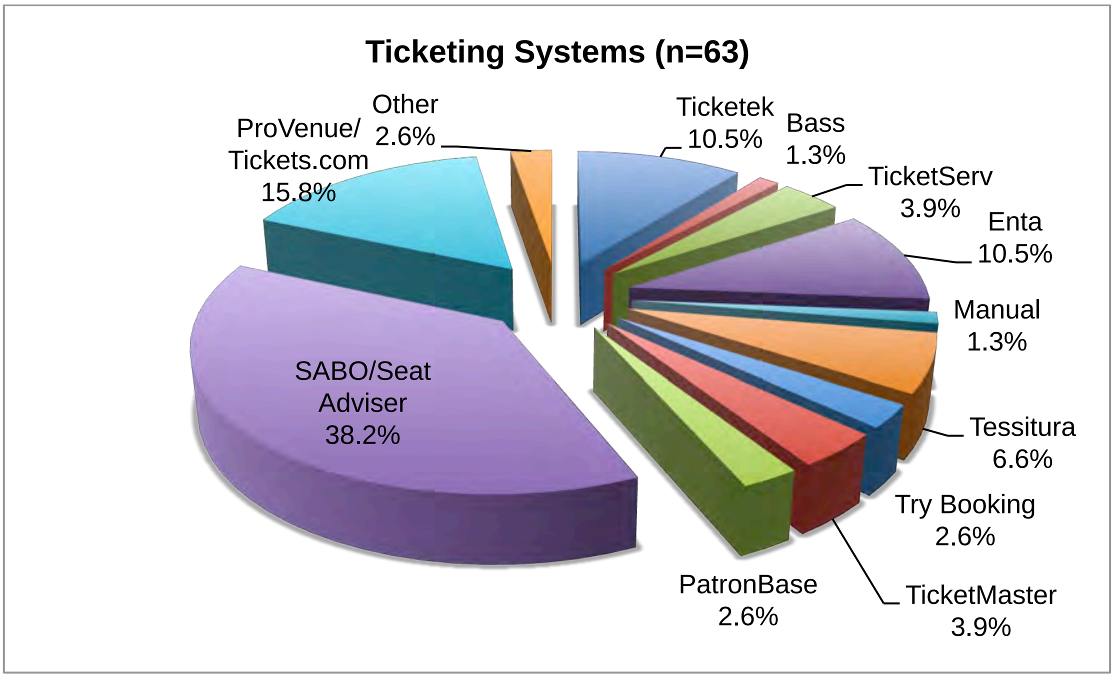


Figure 30: Ticketing Systems used by Respondents

Most respondents (74.6%) have two or more points-of-sale in their box office with almost half (46%) operating with two points-of-sale for ticketing (Figure 31). 17.2% of venues reported using external box office outlets and of these, 58% have only one outlet with the remainder operating with up to 4 external outlets.

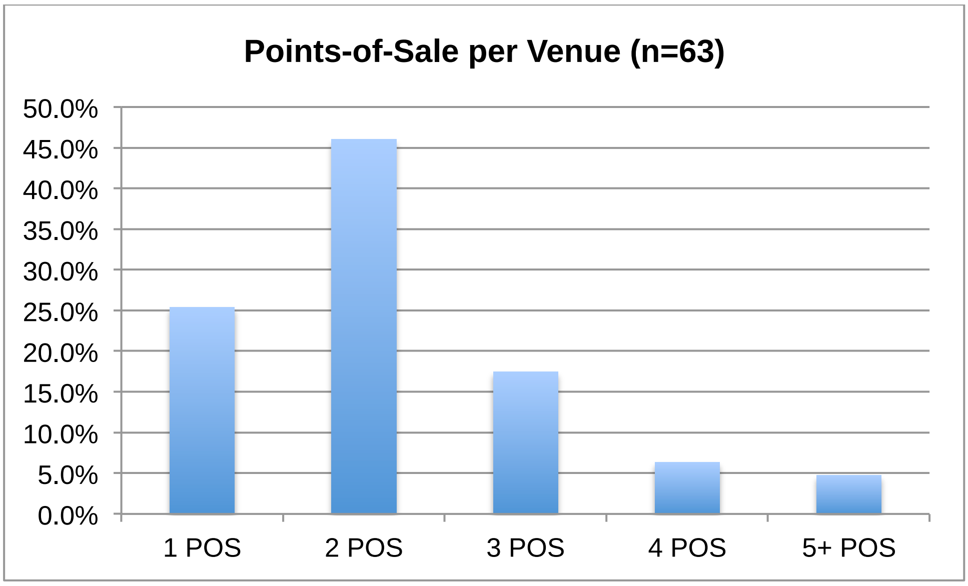


Figure 31: Points-of-Sale per Venue

The following charts allow centres to benchmark their sales channels usage. The charts show the percentage of respondents on the y-axis and the level of usage for each sales channel on the x-axis.

Almost 97% of venues report using all three sales channels, telephone, counter and on-line in their box office. Since 2013, the use of on-line channels for sales has increased significantly over sales via telephone and counter.

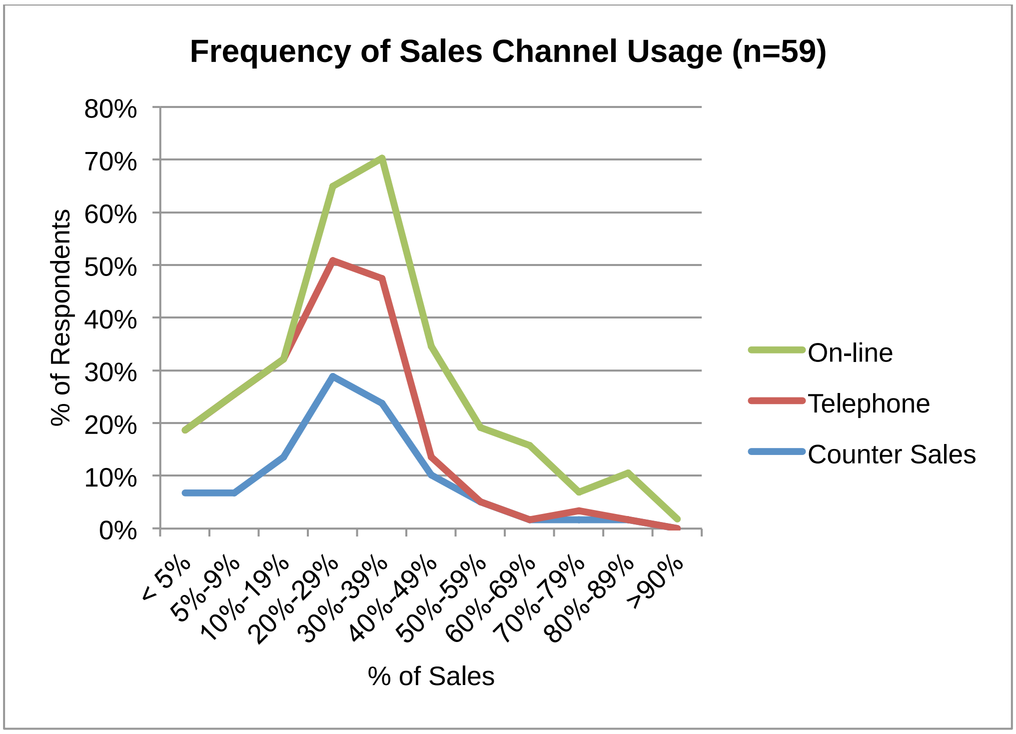


Figure 32: Frequency of Sales Channel Usage (on-line, telephone & counter sales)

Figure 33 provides sales channels used externally by nine respondent venues. “External Agency” refers to sales through a third party in another location, while “Outlet” refers to a box office run by the venue at another location.

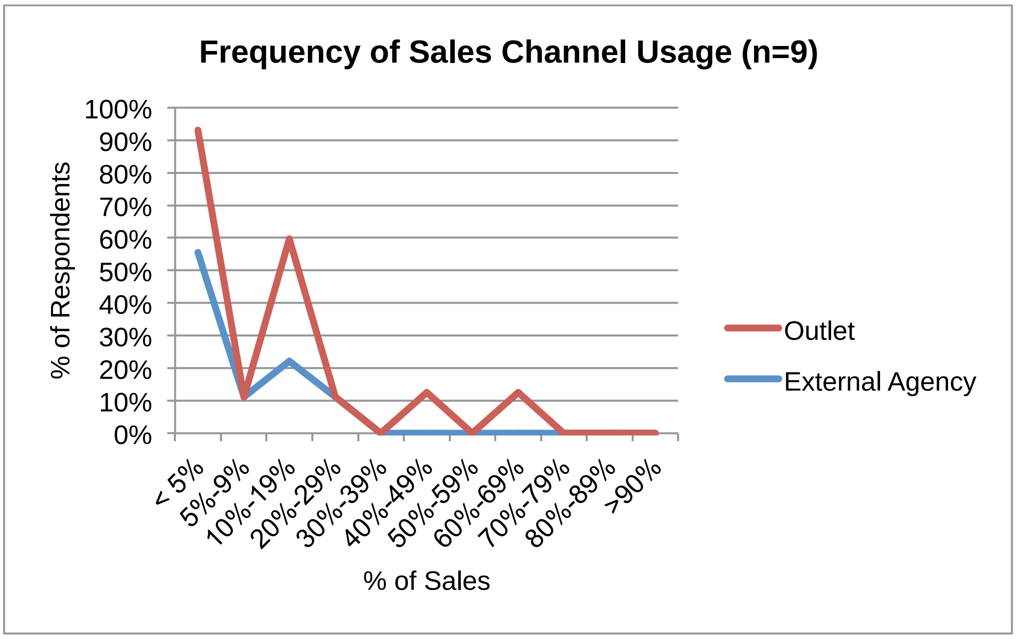


Figure 33: Frequency of Usage for External Sales Channels

Ticketing Charges

Centres deal with ticketing fees in a range of ways as the following charts and tables demonstrate. In terms of event builds, 41% of respondents reported they charge a fee to build a new event in their ticketing software and 22% charge to edit an event already on sale. Most charge a fee between $40 and $100 with 63.3% charging per performance while 36.7% charge per event for this service.

Figure 34 shows how respondents charge for card merchant fees.

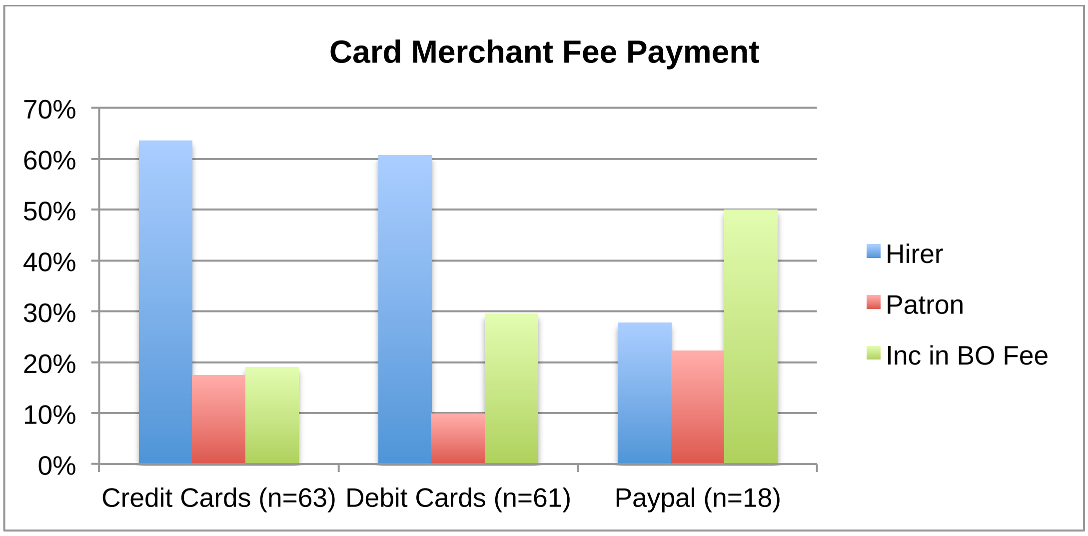


Figure 34: Card Merchant Fee Payment

		Inside Charges Per Ticket											
Ticket Face Value		Comps		$15		$25		$50		$75		$100+	
Venue	State	Commercial	Community	Commercial	Community	Commercial	Community	Commercial	Community	Commercial	Community	Commercial	Community
Canberra Theatre Centre	ACT			$1.50		$2.00		$3.00		$3.50		$4.00	
Street Theatre	ACT	$2.00	$2.00	$4.00	$3.00	$4.00	$3.00	$4.00	$3.00	$4.00	$3.00	$4.00	$3.00
Albury Entertainment Centre	NSW	$2.00	$1.20	$3.50	$2.50	$3.50	$2.50	$4.00	$2.50	$4.50	$2.50		
Bathurst Memorial Entertainment Centre	NSW	$0.40	$0.40	$1.50	$1.00	$1.50	$1.00	$2.50	$2.00	$4.00	$3.00	$4.00	$3.00
Dubbo Regional Theatre and Convention Centre	NSW	$1.00	$1.00	$5.50	$5.50	$5.50	$5.50	$5.50	$5.50	$5.50	$5.50	$5.50	$5.50
Griffith Regional Theatre	NSW	$3.00	$2.50	$3.00	$2.50	$3.00	$2.50	$3.00	$2.50	$3.00	$2.50	$3.00	$2.50
Illawarra Performing Arts Centre	NSW	$1.00	$1.00	$3.20	$3.20	$3.20	$3.20	$4.50	$4.50	$6.00	$6.00	$6.00	$6.00
Joan Sutherland Performing Arts Centre	NSW	$1.00	$1.00	$4.00	$2.50	$4.00	$2.50	$4.00	$2.50	$4.00	$2.50	$4.00	$2.50
Manning Entertainment Centre	NSW			$2.00	$2.00	$2.00	$2.00	$2.00	$2.00	$2.00	$2.00	$2.00	$2.00
Monkey Baa Theatre Company	NSW	$1.00	$0.40	$2.50	$1.50	$2.50	$1.50	$2.50	$1.50	$2.50	$1.50	$2.50	$1.50
NIDA Parade Theatres	NSW	$0.40	$0.40	$1.50	$1.50	$2.00	$2.00	$2.00	$2.00	$3.50	$3.50	$3.50	$3.50
Orange Civic Theatre	NSW	$0.40	$0.40	$2.00	$4.00	$4.00	$4.00	$6.00	$6.00	$6.00	$6.00	$6.00	$6.00
Riverside Theatres Parramatta	NSW	$1.00	$1.00	$2.80	$2.80	$2.80	$2.80	$5.50	$5.50	$6.00	$6.00	$6.00	$6.00
Seymour Centre	NSW	$0.40	$0.40	$2.20	$2.20	$2.60	$2.40	$3.00	$2.80	$3.60	$3.00	$3.60	$3.00
Shoalhaven Entertainment Centre	NSW	$1.00	$1.00	$2.20	$1.20	$3.60	$2.00	$5.50	$2.80	$6.00	$3.20	$6.00	$3.20
The Glasshouse Port Macquarie	NSW	$1.00	$1.00	$1.50	$1.50	$3.00	$3.00	$4.00	$4.00	$5.00	$5.00	$6.00	$6.00
Wagga Wagga Civic Theatre	NSW	$0.40	$0.40	$1.50	$1.50	$3.80	$2.80	$3.80	$2.80	$3.80	$2.80	$3.80	$2.80
BEMAC - Brisbane Multicultural Arts Centre	QLD	$0.40	$0.40	$3.00	$3.00	$3.00	$3.00	$6.00	$6.00	$6.00	$6.00	$6.00	$6.00
Brisbane Powerhouse	QLD			$2.60	$2.60	$2.60	$2.60	$2.60	$2.60	$2.60	$2.60	$2.60	$2.60
Brolga Theatre	QLD	$1.00	$1.00	$2.60	$2.60	$2.80	$2.80	$5.00	$5.00	$5.00	$5.00	$5.00	$5.00
Cairns Civic Theatre	QLD	$2.20	$2.20	$3.40	$3.40	$3.40	$3.40	$3.40	$3.40	$3.40	$3.40	$3.40	$3.40
Empire Theatre	QLD	$1.50	$1.50	$2.60	$2.60	$4.00	$4.00	$4.00	$4.00	$5.00	$5.00		
Gladstone Entertainment Convention Centre	QLD	$1.00	$1.00	$2.50	$1.50	$2.50	$1.50	$4.50	$3.00	$4.50	$3.00	$4.50	$3.00
Judith Wright Centre of Contemporary Arts	QLD	$1.00	$1.00	$2.20	$2.20	$4.00	$4.00	$4.00	$4.00				
Lake Kawana Community Centre	QLD			$3.50	$3.50	$3.50	$3.50	$3.50	$3.50	$3.50	$3.50	$3.50	$3.50
Lake Kawana Community Centre	QLD		$3.50	$3.50	$3.50	$3.50	$3.50	$3.50	$3.50	$3.50	$3.50	$3.50	$3.50
Mackay Entertainment & Convention Centre	QLD			$3.50	$3.50	$5.00	$5.00	$5.50	$5.50	$5.50	$5.50	$5.50	$5.50
Pilbeam Theatre	QLD	$3.00	$2.50	$3.60	$2.50	$3.60	$2.50	$4.00	$2.80	$5.00	$3.00	$6.00	$3.80
QUT Gardens Theatre	QLD	$0.40	$0.40	$2.00	$2.00	$3.50	$3.50	$4.50	$4.50	$4.50	$4.50	$4.50	$4.50
Redland Performing Arts Centre	QLD	$2.00	$2.00	$3.50	$3.20	$3.50	$3.20	$3.50	$3.20	$3.50	$3.20	$3.50	$3.20
The Events Centre	QLD	$1.20	$1.00	$3.60	$3.00	$3.60	$3.00	$3.60	$3.00	$3.60	$3.00	$3.60	$3.00
Townsville Civic Theatre	QLD												
Barossa Arts & Convention Centre	SA	$2.60	$2.60	$2.60	$2.60	$2.60	$2.60	$2.60	$2.60	$2.60	$2.60	$2.60	$2.60
The Hopgood Theatre	SA	$2.00	$2.00	$3.00	$3.00	$4.00	$4.00	$4.50	$4.50	$5.00	$5.00	$5.00	$5.00

		Inside Charges Per Ticket											
Ticket Face Value		Comps		$15		$25		$50		$75		$100+	
Venue	State	Commercial	Community	Commercial	Community	Commercial	Community	Commercial	Community	Commercial	Community	Commercial	Community
Burnie Arts and Function Centre	TAS	$3.50	$1.00	$3.50	$2.20	$3.50	$3.20	$4.00	$3.20	$4.00	$3.20	$4.00	$3.20
Devonport Entertainment and Convention Centre	TAS	$4.00	$2.50	$4.00	$2.50	$4.00	$2.50	$4.00	$2.50	$4.00	$2.50	$4.00	$2.50
Theatre Royal	TAS			$3.40	$3.40	$4.00	$4.00	$4.50	$4.50	$5.00	$5.00	$5.00	$5.00
Arts Centre Melbourne	VIC	$2.00	$2.00	$3.00	$3.00	$3.50	$3.50	$5.00	$5.00	$6.00	$6.00	$6.00	$6.00
Capitol Venues and Events	VIC	$2.00	$1.00	$4.00	$2.00	$4.00	$2.00	$4.00	$2.00	$4.00	$2.00	$4.00	$2.00
Clocktower Centre	VIC	$1.00	$1.00	$3.40	$2.40	$3.40	$2.40	$3.40	$2.40	$3.40	$2.40	$3.40	$2.40
Colac Otway Performing Arts and Cultural Centre	VIC			$2.80	$1.50	$2.80	$1.50	$2.80	$1.50	$2.80	$1.50	$2.80	$1.50
Eastbank Centre - Riverlinks Venues	VIC	$0.40	$0.40	$5.00	$2.50	$5.00	$2.50	$5.00	$2.50	$5.00	$2.50	$5.00	$2.50
Frankston Arts Centre	VIC	$3.80	$2.20	$3.80	$2.20	$3.80	$2.20	$3.80	$2.20	$3.80	$2.20	$3.80	$2.20
Geelong Performing Arts Centre	VIC	$2.20	$2.20	$3.60	$3.00	$3.60	$3.00	$3.60	$3.00	$3.60	$3.00	$3.60	$3.00
Her Majesty's Theatre	VIC	$1.00	$1.00	$1.50	$1.50	$4.50	$3.20	$4.50	$3.20	$4.50	$3.20	$4.50	$3.20
Karralyka Centre	VIC	$1.00	$1.00	$4.00	$2.00	$4.00	$2.00	$4.00	$2.00	$4.00	$2.00	$4.00	$2.00
Melbourne Theatre Company	VIC	$1.20	$1.20	$2.20	$2.20	$3.50	$3.50	$5.00	$5.00	$5.50	$5.50	$6.00	$6.00
Mildura Arts Centre	VIC			$4.00	$1.50	$4.00	$1.50	$4.00	$1.50	$4.00	$1.50	$4.00	$1.50
Monash University Academy of Performing Arts	VIC	$1.00	$1.00	$3.80	$2.40	$3.80	$2.40	$3.80	$2.40	$3.80	$2.40	$3.80	$2.40
Portland Arts Centre	VIC	$3.00	$3.00	$3.00	$3.00	$3.00	$3.00	$3.00	$3.00	$3.00	$3.00	$3.00	$3.00
The Cube Wodonga	VIC	$2.20	$1.20	$4.00	$2.20	$4.00	$2.20	$4.00	$2.20	$4.00	$2.20	$4.00	$2.20
West Gippsland Arts Centre	VIC	$1.00	$1.00	$3.60	$2.40	$3.60	$2.40	$3.60	$2.40	$3.60	$2.40	$3.60	$2.40
Whitehorse Performing Arts Centre	VIC			$3.50	$1.50	$3.50	$1.50	$3.50	$1.50	$3.50	$1.50	$3.50	$1.50
Broome Civic Centre [Shire of Broome]	WA	$4.00		$4.00	$4.00	$4.00	$4.00	$4.00	$4.00	$4.00	$4.00	$4.00	$4.00
Bunbury Regional Entertainment Centre	WA	$2.50	$2.50	$3.60	$3.60	$3.60	$3.60	$6.00	$6.00	$6.00	$6.00	$6.00	$6.00
Don Russell Performing Arts Centre	WA			$1.20	$1.20	$1.20	$1.20	$1.20	$1.20				
Esperance Civic Centre	WA	$5.00	$4.00	$5.00	$4.00	$5.00	$4.00	$5.00	$4.00	$5.00	$4.00	$5.00	$4.00
His Majesty's Theatre	WA	$0.40		$4.50		$5.50		$6.00		$6.00		$6.00	
Koorliny Arts Centre	WA												
Mandurah Performing Arts Centre	WA	$3.50	$3.50	$3.50	$3.50	$3.50	$3.50	$6.00	$6.00	$6.00	$6.00	$6.00	$6.00
Matt Dann Theatre & Cinema	WA			$4.00	$4.00	$4.00	$4.00	$4.00	$4.00	$4.00	$4.00	$4.50	$4.00
Queens Park Theatre	WA	$0.20	$0.20	$3.00	$3.00	$3.00	$3.00	$3.00	$3.00	$3.00	$3.00	$3.00	$3.00

		Transaction Charges																							
		Telephone Sales				Online Sales				Counter Sales (Primary BO)				Counter Sales External Agency				Refund at Patron's Request				Refund due to Cancellation			
Venue	State	Fee	Per	To Max	Paid by	Fee	Per	To Max	Paid by	Fee	Per	To Max	Paid by	Fee	Per	To Max	Paid by	Fee	Per	To Max	Paid by	Fee	Per	To Max	Paid by
Street Theatre	ACT	$4.00	ticket	no max.	Hirer	$4.00	trans	no max.	Patron	$4.00	ticket	no max	Hirer					N/C				$3.00	ticket	no max.	Hirer
Albury Entertainment Centre	NSW	$3.00	trans	no max.	Patron	N/C	trans	no max.	Patron	$3.00	trans	no max	Patron					$1.50	ticket	no max.	Patron	$1.50	ticket	no max.	Hirer
Dubbo Regional Theatre and Convention Centre	NSW	$3.00	trans	no max.	Patron	N/C				N/C								N/C				$5.00	ticket	no max.	Hirer
Griffith Regional Theatre	NSW	N/C				$1.50			Patron	N/C				N/C								$3.00			Hirer
Illawarra Performing Arts Centre	NSW	$6.00		$6.00	Patron	$6.00		$6.00	Patron	N/C				-				-				2 x original B/Fee			Hirer
Joan Sutherland Performing Arts Centre	NSW	$4.00	trans	$4.00	Patron	$4.00	trans	$4.00	Patron	$4.00	trans	$4	Patron					$4.00	trans	$4.00	Patron	N/C			
Manning Entertainment Centre	NSW	Original B/F	ticket	no max.	Patron	Original B/F	ticket	no max.	Patron	Original B/F	ticket	no max	Patron	Original B/F	ticket	no max	Patron	N/C	ticket	no max.	Patron	Original B/F	ticket	no max.	Patron
Monkey Baa Theatre Company	NSW	$2.00	trans			$2.00	trans			$2.00	trans			N/C				N/C				N/C			
NIDA Parade Theatres	NSW	$1.50	ticket		Hirer	$1.50	ticket		Hirer	N/C	ticket		Hirer	$1.00	ticket		Hirer								
Orange Civic Theatre	NSW	Original B/F	ticket		Patron	Original B/F	ticket		Patron	Original B/F	ticket		Patron	Original B/F	ticket		Patron	Original B/F	ticket		Patron	Original B/F			Hirer
Riverside Theatres Parramatta	NSW	$5.00	trans	no max.	Patron	$4.00	trans	no max.	Patron	$3.00	trans	no max	Patron		trans	no max	Patron	N/C	trans	no max.	Patron	N/C	trans	no max.	Patron
Seymour Centre	NSW	$6.00	trans	$6.00	Patron	$4.00	trans	$4.00	Patron	N/C			Patron	N/C			Patron	$5.00	ticket	no max.	Hirer	N/C			
Shoalhaven Entertainment Centre	NSW	$4.00	trans	$4.00	Patron	$4.00	trans	$4.00	Patron	N/C				N/C				$3.00	ticket	no max.	Patron	N/C			
The Glasshouse Port Macquarie	NSW	$5.00	trans		Patron	$3.00	trans		Patron	$3.00	trans		Patron	N/C				N/C				2 x original B/Fee	ticket		Hirer
BEMAC - Brisbane Multicultural Arts Centre	QLD	$1.00	trans		Patron	$3.00	ticket		Patron	$1.00	trans		Patron	N/C				N/C				N/C			
Brisbane Powerhouse	QLD	$6.00	trans	$6.00	Patron	$6.00	trans	$6.00	Patron	$6.00	trans	$6	Patron	$6.00	trans	$6	Patron	$6.00	trans	$6.00	Patron	$6.00	trans	$6.00	Hirer
Brolga Theatre	QLD	$3.00	trans		Patron	$3.00	trans		Patron	N/C				N/C				N/C				N/C			
Cairns Civic Theatre	QLD	$5.00	trans	no max.	Patron	$5.00	trans	$5.00	Patron	$5.00	trans	$5	Patron	$5.00	trans	$5	Patron	$2.00				N/C	ticket	no max.	Patron
Empire Theatre	QLD	$5.00	trans	$5.00	Patron	$5.00	trans	$5.00	Patron																
Gladstone Entertainment Convention Centre	QLD	$3.00	trans	no max.	Patron	$3.00	trans	no max.	Patron	N/C															
Judith Wright Centre of Contemporary Arts	QLD	$4.00	trans		Hirer	$4.00	trans		Hirer	N/C	trans	$4	Hirer					2 x original B/Fee	ticket		Patron	2 x original B/Fee	ticket		Hirer

		Telephone Sales				Online Sales				Counter Sales (Primary BO)				Counter Sales External Agency				Refund at Patron's Request				Refund due to Cancellation			
Venue	State	Fee	Per	To Max	Paid by	Fee	Per	To Max	Paid by	Fee	Per	To Max	Paid by	Fee	Per	To Max	Paid by	Fee	Per	To Max	Paid by	Fee	Per	To Max	Paid by
Lake Kawana Community Centre	QLD	$3.00	trans		Patron	N/C	trans			N/C	trans			N/C	trans			N/C	trans			N/C	trans		
Mackay Entertainment & Convention Centre	QLD	$3.00	trans	no max.	Patron																				
Pilbeam Theatre, Rockhampton	QLD	$5.00	trans			$1.50	ticket			N/C				N/C				$3.00				2 x original B/Fee			
QUT Gardens Theatre	QLD	$3.00	trans		Patron	N/C				$3.00	trans		Patron									N/C			
Redland Performing Arts Centre	QLD	$3.00	trans	no max.	Patron	$3.00	ticket		Patron	N/C			Patron												
The Events Centre	QLD	$6.00	trans	no max.	Patron	N/C	ticket			N/C	ticket	no max		N/C	ticket			N/C	ticket			2 x original B/Fee	ticket	no max.	Hirer
Barossa Arts & Convention Centre	SA	$5.00	trans	no max.	Patron	$5.00	trans	no max.	Patron	$5.00	trans	no max	Patron	$5.00	trans	no max.	Patron	N/C	ticket	no max.	Patron	N/C	ticket	no max.	Patron
Marion Cultural Centre	SA	$3.00	ticket	no max.	Hirer	-				$3.00	ticket	no max	Hirer									$3.00	ticket	no max.	Hirer
The Hopgood Theatre	SA	$3.00	trans	no max.	Patron	$2.00	trans	no max.	Patron	$3.00	trans	no max	Patron		ticket	no max	Patron	$2.00	ticket	no max.	Patron	2 x original B/Fee	ticket	no max.	Hirer
Burnie Arts and Function Centre	TAS	$3.00	trans		Patron	$5.00	trans		Patron	N/C	trans		Patron					$4.00	trans		Patron	Original B/F	trans		Hirer
Devonport Entertainment and Convention Centre	TAS	N/C				$2.00	ticket	no max.	Patron	N/C				-				$4.00	ticket	no max.	Patron	$4.00	ticket	no max.	Hirer
Theatre Royal	TAS	N/C				$2.00	trans	no max.	Patron	N/C				N/C				$3.00	ticket	no max.	Patron	N/C			
Arts Centre Melbourne	VIC	$8.00	trans	$10	Patron	$8.00	trans	$10	Patron	N/C	trans			$3.00	ticket	$10	Patron					Original B/F	trans	no max.	Hirer
Capitol Venues and Events	VIC	Original B/F	ticket	no max.	Hirer	Original B/F	ticket	no max.	Hirer	Original B/F	ticket	no max	Hirer					N/C				2 x original B/Fee	ticket	no max.	Hirer
Clocktower Centre	VIC					$7.00	trans	no max.	Patron																
Frankston Arts Centre	VIC	N/C				$1.50	ticket	no max.	Patron	N/C								Original B/F	ticket	no max.	Patron	2 x original B/Fee	trans	no max.	Hirer
Her Majesty's Theatre	VIC	N/C				N/C				N/C				N/C				$5.00	ticket	no max.	Patron	N/C			
Karralyka Centre	VIC	$3.00	trans	no max.	Patron	$3.00	trans	no max.	Patron	$3.00	trans	no max	Patron	N/C	trans	no max	Patron	N/C	trans	no max.	Patron	N/C	trans	no max.	Patron
Melbourne Theatre Company	VIC	$7.00	trans	no max.	Patron	$7.00	trans	no max.	Patron	N/C								Original B/F	ticket	no max.	Patron	N/C			
Mildura Arts Centre	VIC																	$3.00	trans	no max.	Patron				

		Telephone Sales				Online Sales				Counter Sales (Primary BO)				Counter Sales External Agency				Refund at Patron's Request				Refund due to Cancellation			
Venue	State	Fee	Per	To Max	Paid by	Fee	Per	To Max	Paid by	Fee	Per	To Max	Paid by	Fee	Per	To Max	Paid by	Fee	Per	To Max	Paid by	Fee	Per	To Max	Paid by
Portland Arts Centre	VIC	$3.00	ticket		Patron	$3.00	ticket		Patron	$3.00	ticket		Patron	$3.00	ticket		Patron	$3.00	ticket		Patron				
The Cube Wodonga	VIC	N/C				N/C				N/C				N/C				N/C				N/C			
West Gippsland Arts Centre	VIC	N/C	ticket			N/C	ticket			N/C	ticket			N/C	ticket			$3.00	ticket			N/C	ticket		
Whitehorse Performing Arts Centre	VIC	$4.00	trans		Patron	$3.00	trans		Patron	N/C								$3.00	ticket	no max.	Patron				
Broome Civic Centre [Shire of Broome]	WA	$4.00	ticket	no max.	Hirer	$4.00	ticket	no max.	Hirer	$4.00	ticket	no max.	Hirer	N/C				N/C				N/C			
Bunbury Regional Entertainment Centre	WA																					2 x original B/Fee	ticket		
Esperance Civic Centre	WA	Original B/F				Original B/F				Original B/F				Original B/F				Original B/F				Original B/F			
His Majesty's Theatre	WA	$7.00	trans		Patron	$7.00	trans		Patron	$7.00	trans		Patron	$7.00	trans		Patron	$4.00	ticket		Patron	N/C			
Mandurah Performing Arts Centre	WA	$4.00	trans	no max.	Patron	$4.00	trans	no max.	Patron	N/C								N/C				N/C			
Matt Dann Theatre & Cinema	WA	$4.00	ticket	no max.	Patron	$3.00	ticket	no max.	Patron	$4.00	ticket	no max	Patron	N/C				N/C				N/C			
Queens Park Theatre	WA	N/C				N/C				N/C				N/C				$3.00	ticket	no max.	Patron	$3.00	ticket	no max.	Hirer
University Theatres - University of Western Australia	WA	$5.00	trans	$5.00	Patron	$2.00	ticket	no max.	Hirer	N/C								$5.00	trans	$5.00	Patron	$5.00	trans	$5.00	Hirer

Subscribers and Volunteers

Venue	State	No. of Subscribers	No. of Shows in Subs Package	Membership, Friends or Loyalty Programs			
				Operated by Venue – Members Volunteer in Venue	Operated by Venue – no Volunteers	Separate Organisation – Members Volunteer in Venue	No. of Members
Canberra Theatre Centre	ACT	500	> 10				
Street Theatre	ACT				✓		50-100
Albury Entertainment Centre	NSW	100-150	8		✓		100-200
Bathurst Memorial Entertainment Centre	NSW	200-300	> 10				
City Recital Hall Angel Place	NSW				✓		200
Dubbo Regional Theatre and Convention Centre	NSW	300-400	> 10	✓			
Griffith Regional Theatre	NSW				✓		100-200
Illawarra Performing Arts Centre	NSW	500	> 10				
Joan Sutherland Performing Arts Centre	NSW	200-300	> 10				
Manning Entertainment Centre	NSW	Nil	Nil	✓			50-100
Monkey Baa Theatre Company	NSW	Nil	Nil				
NIDA Parade Theatres	NSW	Nil	Nil				
Orange Civic Theatre	NSW	500	> 10				
Riverside Theatres Parramatta	NSW	400-500	> 10		✓		200
Shoalhaven Entertainment Centre	NSW	Nil	Nil		✓		100-200
The Glasshouse Port Macquarie	NSW	Nil	Nil		✓		200
Wagga Wagga Civic Theatre	NSW	400-500	> 10				
BEMAC - Brisbane Multicultural Arts Centre	QLD	Nil	Nil		✓		50-100
Brisbane Powerhouse	QLD	Nil	Nil				
Brolga Theatre	QLD					✓	200
Cairns Civic Theatre	QLD	Nil	Nil				
Empire Theatre	QLD					✓	400
Gladstone Entertainment Convention Centre	QLD	< 50	6			✓	50-100
Lake Kawana Community Centre	QLD	< 50	7		✓		25-50
Mackay Entertainment & Convention Centre	QLD	Nil	Nil	✓			200
Pilbeam Theatre	QLD	< 50	10			✓	50-100

Venue	State	No. of Subscribers	No. of Shows in Subs Package	Membership, Friends or Loyalty Programs			
				Operated by Venue – Members Volunteer in Venue	Operated by Venue – no Volunteers	Separate Organisation – Members Volunteer in Venue	No. of Members
QUT Gardens Theatre	QLD	150-200	5				
The Events Centre	QLD	Nil		✓			200
Barossa Arts & Convention Centre	SA	Nil	Nil	✓			50-100
Marion Cultural Centre	SA	< 50	> 10				
The Hopgood Theatre	SA	Nil	Nil		✓		50-100
Burnie Arts and Function Centre	TAS	500	> 10				
Devonport Entertainment and Convention Centre	TAS	100-150	> 10				
Theatre Royal	TAS	500	10			✓	100-200
Arts Centre Melbourne	VIC				✓		200
Capitol Venues and Events	VIC	150-200	> 10		✓		200
Clocktower Centre	VIC	200-300	8				
Colac Otway Performing Arts and Cultural Centre	VIC	< 50	7				
Eastbank Centre - Riverlinks Venues	VIC				✓		200
Frankston Arts Centre	VIC				✓		200
Geelong Performing Arts Centre	VIC	500	9	✓			200
Her Majesty's Theatre	VIC	50-100	> 10		✓		100-200
Karralyka Centre	VIC	50-100	9		✓		50-100
Melbourne Theatre Company	VIC	500	> 10		✓		200
Mildura Arts Centre	VIC	Nil	Nil			✓	50-100
The Cube Wodonga	VIC	Nil	Nil		✓		50-100
West Gippsland Arts Centre	VIC				✓		200
Whitehorse Performing Arts Centre	VIC	500	6				
Bunbury Regional Entertainment Centre	WA	Nil	Nil			✓	200
Don Russell Performing Arts Centre	WA	Nil	Nil				
Esperance Civic Centre	WA	Nil	Nil		✓		25-50
Mandurah Performing Arts Centre	WA	Nil	Nil			✓	200
Matt Dann Theatre & Cinema	WA	Nil	Nil		✓		25-50
Queens Park Theatre	WA	Nil	Nil			✓	<25

Volunteers take on various roles in centres. The 2015 survey asked venues to estimate the number of hours that volunteers work in four different areas within their venues.

The use of volunteers in front of house positions has the highest participation rate with a significant annual contribution of approximately 43,390 hours. This contribution remains comparatively constant to the 2013 results. In addition, volunteers provide 8,250 hours in food and beverage services, 1,640 hours in administration and 660 in technical areas.

In the Figure below, the percentage of venues engaging volunteers in each role is shown within each category of venue turnover. 17 venues that use volunteers did not provide turnover figures. The results show that volunteers undertaking technical roles have reduced since 2013. In the participating venues with more than $5M turnover, no volunteer programs are in place.

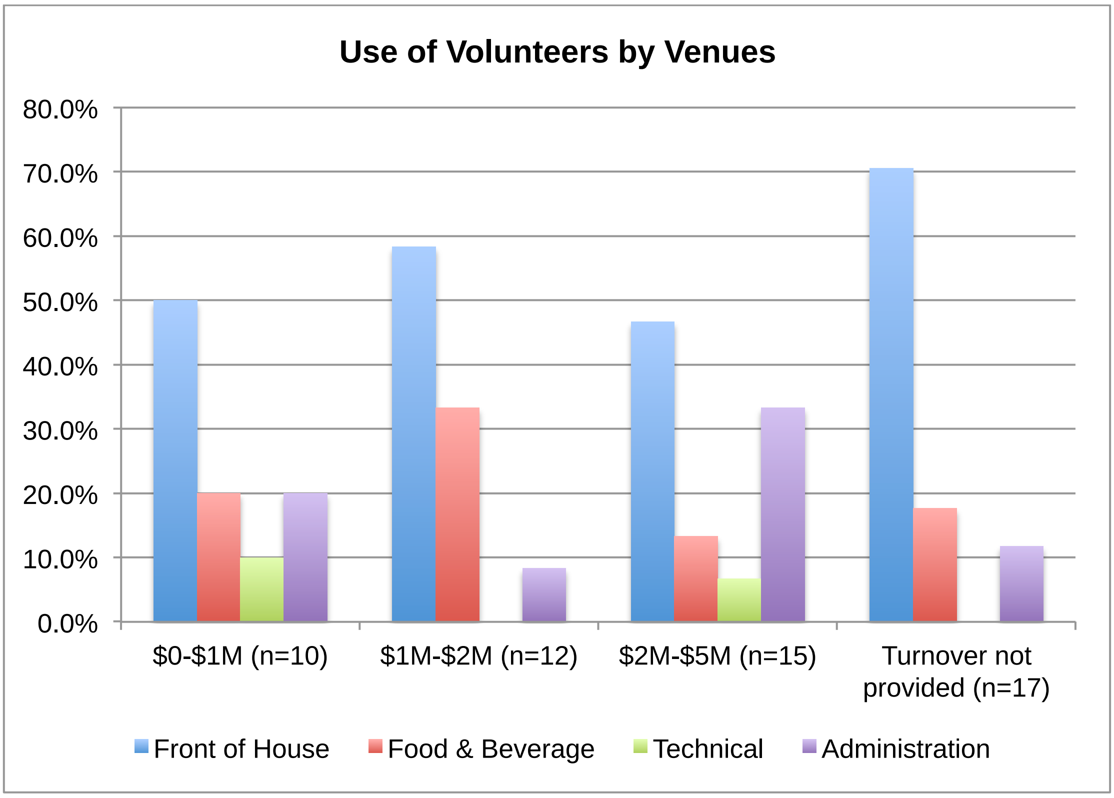


Figure 35: Use of Volunteers

Other Venue Services and Charges

Figure 36 shows a variety of arrangements are in place for the provision of food and beverage services within respondent venues. Most venues (84%) manage their own bars. The provision of food is managed through a variety of options for both patrons and delivery to artists backstage.

For an increasing number of venues, food provision is being taken on as part of core business and less are outsourcing these services. When comparing these results with 2013, the provision of light meals and snacks has been introduced by approximately 15% more venues and possibly correlates to the 9% increase in venues now operating their own bar.   Provision of catering by the venue has also increased from approximately 10% to 25% of respondent venues.

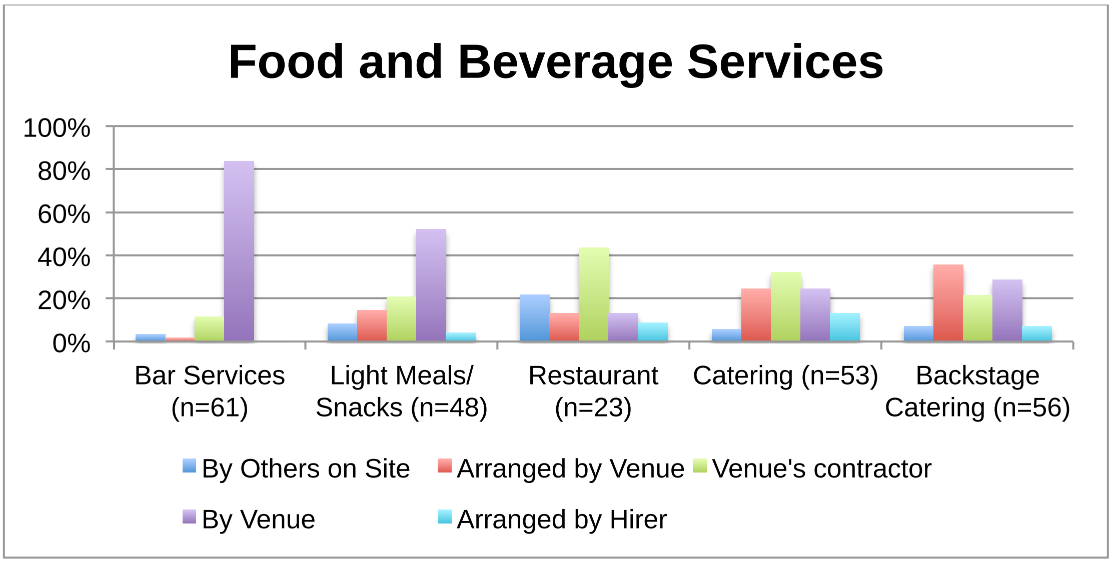


Figure 36: Food and Beverage Services

Figure 37 shows the commission charged by respondents on programs, merchandise and equipment hire. The most frequently charged percentage commission on programs and merchandise was 10% consistent with past surveys. In 2013, almost half of the respondents (45%) did not charge commission on equipment hire. This has slightly reduced to 43% although the number charging higher percentage rates of 15% and 20% has also reduced since 2013.

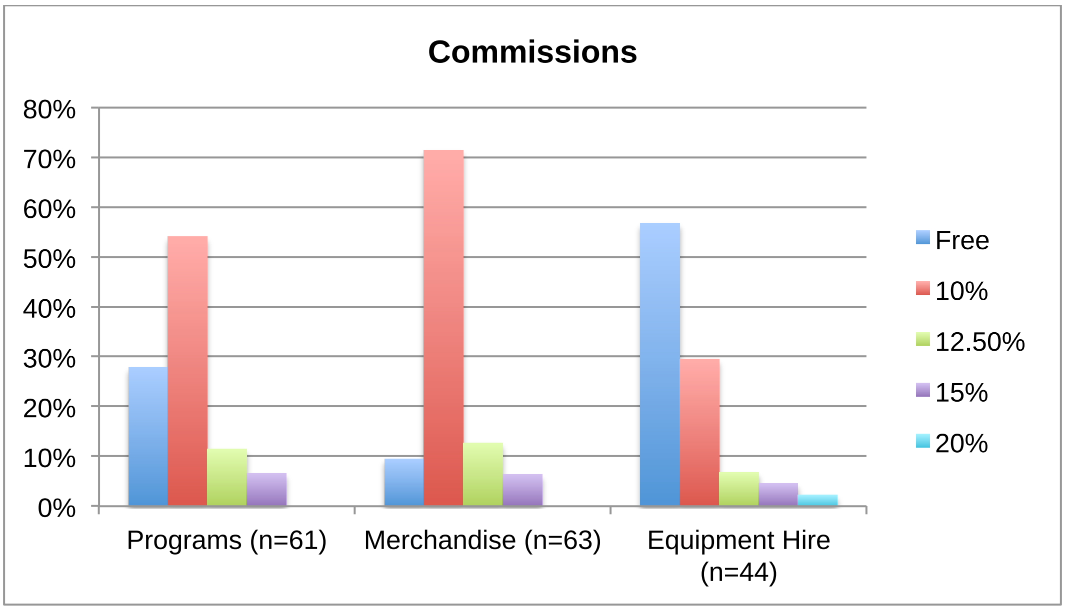


Figure 37: Commissions on Programs, Merchandise and Equipment Hire

		Outsourced Services and Functions to Building Owner											
		Finance		Payroll		Human Resources		Building Maintenance		Cleaning		Building Security	
Venue	State	No cost	Charge	No cost	Charge	No cost	Charge	No cost	Charge	No cost	Charge	No cost	Charge
Albury Entertainment Centre	NSW		✓		✓		✓	✓			✓		✓
Bathurst Memorial Entertainment Centre	NSW		✓		✓		✓				✓		✓
Dubbo Regional Theatre and Convention Centre	NSW		✓		✓		✓		✓		✓		✓
Griffith Regional Theatre	NSW	✓		✓		✓			✓		✓		✓
Illawarra Performing Arts Centre	NSW											✓	
Joan Sutherland Performing Arts Centre	NSW												✓
Manning Entertainment Centre	NSW	✓		✓		✓					✓		✓
Monkey Baa Theatre Company	NSW	✓		✓		✓		✓			✓		✓
NIDA Parade Theatres	NSW	✓		✓		✓		✓		✓		✓	
Orange Civic Theatre	NSW	✓		✓		✓		✓			✓		✓
Riverside Theatres Parramatta	NSW	✓		✓		✓							
Seymour Centre	NSW		✓		✓		✓						✓
Shoalhaven Entertainment Centre	NSW		✓		✓		✓	✓					
The Glasshouse Port Macquarie	NSW		✓		✓		✓		✓		✓		✓
Wagga Wagga Civic Theatre	NSW	✓		✓		✓				✓		✓	
BEMAC - Brisbane Multicultural Arts Centre	QLD		✓		✓		✓		✓		✓		✓
Brisbane Powerhouse	QLD										✓		✓
Brolga Theatre	QLD	✓		✓		✓							✓
Cairns Civic Theatre	QLD		✓		✓		✓		✓		✓		✓
Empire Theatre	QLD											✓	
Gladstone Entertainment Convention Centre	QLD		✓		✓		✓						
Judith Wright Centre of Contemporary Arts	QLD	✓		✓		✓				✓		✓	
Lake Kawana Community Centre	QLD	✓		✓		✓		✓			✓		✓
Mackay Entertainment & Convention Centre	QLD		✓		✓		✓	✓		✓			✓
Pilbeam Theatre	QLD	✓		✓		✓						✓	
QUT Gardens Theatre	QLD	✓		✓		✓			✓	✓		✓	
Redland Performing Arts Centre	QLD		✓		✓		✓		✓		✓		✓
The Events Centre	QLD				✓		✓						
Barossa Arts & Convention Centre	SA	✓		✓		✓					✓	✓	
Marion Cultural Centre	SA	✓		✓		✓			✓	✓		✓	
Playford Civic Centre	SA										✓		
The Hopgood Theatre	SA	✓		✓		✓		✓		✓		✓	

		Finance		Payroll		Human Resources		Building Maintenance		Cleaning		Building Security	
Venue	State	No cost	Charge	No cost	Charge	No cost	Charge	No cost	Charge	No cost	Charge	No cost	Charge
Burnie Arts and Function Centre	TAS		✓		✓		✓		✓		✓		✓
Devonport Entertainment and Convention Centre	TAS		✓		✓		✓		✓		✓		✓
Capitol Venues and Events	VIC		✓		✓		✓				✓		✓
Clocktower Centre	VIC	✓		✓		✓					✓		✓
Colac Otway Performing Arts and Cultural Centre	VIC	✓		✓		✓					✓		✓
Eastbank Centre - Riverlinks Venues	VIC		✓		✓		✓		✓		✓		✓
Frankston Arts Centre	VIC		✓		✓		✓		✓		✓		✓
Geelong Performing Arts Centre	VIC								✓				✓
Her Majesty's Theatre	VIC	✓		✓		✓							
Karralyka Centre	VIC	✓		✓		✓		✓		✓		✓	
Mildura Arts Centre	VIC	✓		✓		✓			✓		✓	✓	
Monash University Academy of Performing Arts	VIC		✓		✓		✓		✓		✓	✓	
Portland Arts Centre	VIC	✓		✓		✓			✓		✓		✓
The Cube Wodonga	VIC		✓		✓	✓			✓		✓		✓
West Gippsland Arts Centre	VIC	✓		✓		✓					✓		✓
Whitehorse Performing Arts Centre	VIC		✓		✓		✓						
Broome Civic Centre [Shire of Broome]	WA	✓		✓		✓		✓			✓		✓
Don Russell Performing Arts Centre	WA		✓			✓			✓	✓		✓	
Esperance Civic Centre	WA		✓				✓		✓		✓		✓
His Majesty's Theatre	WA	✓				✓		✓		✓			✓
Mandurah Performing Arts Centre	WA					✓							✓
Matt Dann Theatre & Cinema	WA	✓				✓		✓		✓		✓	
Queens Park Theatre	WA	✓	✓			✓		✓			✓		✓

Appendix A – Respondents

Canberra Theatre Centre	ACT
Street Theatre	ACT
Albury Entertainment Centre	NSW
Bathurst Memorial Entertainment Centre	NSW
City Recital Hall Angel Place	NSW
Dubbo Regional Theatre and Convention Centre	NSW
Griffith Regional Theatre	NSW
Illawarra Performing Arts Centre	NSW
Joan Sutherland Performing Arts Centre	NSW
Laycock Street Community Theatre	NSW
Manning Entertainment Centre	NSW
Monkey Baa Theatre Company	NSW
NIDA Parade Theatres	NSW
Orange Civic Theatre	NSW
Riverside Theatres Parramatta	NSW
Seymour Centre	NSW
Shoalhaven Entertainment Centre	NSW
The Glasshouse Port Macquarie	NSW
Wagga Wagga Civic Theatre	NSW
BEMAC - Brisbane Multicultural Arts Centre	QLD
Brisbane Powerhouse	QLD
Brolga Theatre	QLD
Cairns Civic Theatre	QLD
Empire Theatre	QLD
Gladstone Entertainment Convention Centre	QLD
Ipswich Civic Centre	QLD
Judith Wright Centre of Contemporary Arts	QLD
Lake Kawana Community Centre	QLD
Mackay Entertainment & Convention Centre	QLD
Pilbeam Theatre, Rockhampton	QLD
QUT Gardens Theatre	QLD
Redland Performing Arts Centre	QLD
The Events Centre, Caloundra	QLD
Townsville Civic Theatre	QLD
Barossa Arts & Convention Centre	SA
Marion Cultural Centre	SA
Murray Bridge Town Hall	SA
Playford Civic Centre	SA
The Hopgood Theatre	SA
Burnie Arts and Function Centre	TAS
Devonport Entertainment and Convention Centre	TAS
Theatre Royal	TAS
Arts Centre Melbourne	VIC
Capitol Venues and Events	VIC
Clocktower Centre	VIC
Colac Otway Performing Arts and Cultural Centre	VIC
Drum Theatre	VIC
Eastbank Centre - Riverlinks Venues	VIC
Frankston Arts Centre	VIC
Geelong Performing Arts Centre	VIC
Her Majesty's Theatre	VIC
Karralyka Centre	VIC

Melbourne Theatre Company	VIC
Mildura Arts Centre	VIC
Monash University Academy of Performing Arts	VIC
Portland Arts Centre	VIC
The Cube Wodonga	VIC
West Gippsland Arts Centre	VIC
Whitehorse Performing Arts Centre	VIC
Broome Civic Centre, Shire of Broome	WA
Bunbury Regional Entertainment Centre	WA
Don Russell Performing Arts Centre	WA
Esperance Civic Centre	WA
His Majesty's Theatre	WA
Koorliny Arts Centre	WA
Mandurah Performing Arts Centre	WA
Matt Dann Theatre & Cinema	WA
Queens Park Theatre	WA
University Theatres - University of Western Australia	WA

Appendix B – Survey Questionnaire

APACA

1. Introduction

This is the final part of the 2015 APACA Survey

The survey covers your venue's fees and charges and the remuneration of you and your staff.

You can return to the survey any number of times to complete various questions and you can email your centre's email link to various members of your team for completion of questions relevant to their area of responsibility.

BUT, PLEASE DON'T USE A SURVEY LINK THAT HAS NOT BEEN SPECIFICALLY SENT TO YOUR CENTRE.

Please do not include dollar signs ['$'], commas or spaces in numeric responses and please enter a zero for zero values, do not leave the field blank or enter 'N/A'.

If you require assistance regarding clarification of definitions and/or questions please direct your enquiry via email to Rick Heath [ed@apaca.com.au] or call 1300 66 52 63 [please note WA time zone]

1. Your Name:

* 2. Organisation name: (ie the APACA member)

Other (please specify)

3. State/Territory:

◯ NT ◯ QLD ◯ NSW ◯ ACT ◯ VIC ◯ TAS ◯ SA ◯ WA

1

APACA

2. Venue Hire Charges - Primary Space

You will have the opportunity to provide Venue Hire charges for up to four spaces. Please enter details for your primary performance space on this page.

If you have different rates for a different days of the week please include the highest rate on this survey.

4. Audience capacity of the primary space

- ◯ Under 500
- ◯ 500 to 999
- ◯ 1,000 to 1,999
- ◯ Over 2,000

After you have entered the venue charges you will be able to indicate what is or is not included in the package hire rate.

5. Commercial Hire (Package Rate)

Per week

Per day

Per session

Hours per session

Vs % of Net Box Office

6. Commerical Hire Rehearsal Rate

Per hour

Per day

2

7. Community Subsidised Hire (Package Rate)

Per week

Per day

Per session

Hours per session

Vs % of Net Box Office

8. Community Subsidised Hire Rehearsal Rate

Per hour

Per day

9. Do you have any other hire rates for this spaces other than Commercial and Community Use ?

- [ ] Schools
- [ ] Eisteddfod
- [ ] Conferences
- [ ] Groups

Other (please specify)

* 10. Does the centre operate more than one space for which you wish to enter venue charges

3

APACA

3. Venue Hire Charges - Space 2

After you have entered the venue charges you will be able to indicate what is or is not included in the package hire rate.

11. Audience capacity of the space

- ◯ Under 500
- ◯ 500 to 999
- ◯ 1,000 to 1,999
- ◯ Over 2,000

12. Commercial Hire (Package Rate)

Per week

Per day

Per session

Hours per session

Vs % of Net Box Office

13. Commerical Hire Rehearsal Rate

Per hour

Per day

4

14. Community Subsidised Hire (Package Rate)

Per week

Per day

Per session

Hours per session

Vs % of Net Box Office

15. Community Subsidised Hire Rehearsal Rate

Per hour

Per day

* 16. Do you wish to enter venue charges for another space

APACA

4. Venue Hire Charges - Space 3

After you have entered the venue charges you will be able to indicate what is or is not included in the package hire rate.

17. Audience capacity of the space

- ○ Under 500
- ○ 500 to 999
- ○ 1,000 to 1,999
- ○ Over 2,000

18. Commercial Hire (Package Rate)

Per week

Per day

Per session

Hours per session

Vs % of Net Box Office

19. Commerical Hire Rehearsal Rate

Per hour

Per day

20. Community Subsidised Hire (Package Rate)

Per week

Per day

Per session

Hours per session

Vs % of Net Box Office

21. Community Subsidised Hire Rehearsal Rate

Per hour

Per day

* 22. Do you wish to enter venue charges for another space

7

APACA

5. Venue Hire Charges - Space 4

After you have entered the venue charges you will be able to indicate what is or is not included in the package hire rate.

23. Audience capacity of the space

- Under 500
- 500 to 999
- 1,000 to 1,999
- Over 2,000

24. Commercial Hire (Package Rate)

Per week

Per day

Per session

Hours per session

Vs % of Net Box Office

25. Commerical Hire Rehearsal Rate

Per hour

Per day

8

26. Community Subsidised Hire (Package Rate)

Per week

Per day

Per session

Hours per session

Vs % of Net Box Office

27. Community Subsidised Hire Rehearsal Rate

Per hour

Per day

APACA

6. Venue Hire Charges - applies to all spaces in the venue

* 28. Does the package hire rate for COMMERCIAL USE include

	Yes	No
Electricity	○	○
Air-conditioning	○	○
Basic Lighitng Equipment	○	○
Basic Audio Equipment	○	○
Duty Technician / Technical Staff	○	○
Duty Manager	○	○
Box Officer Ticket Seller	○	○
Cleaning	○	○

29. What qualifies a hirer for the Community Use hire rate
(you may select a number of responses)

- ☐ Public Educational Institution (Kindergarden, Primary or Secondary School)
- ☐ Private Educational Institution (Kindergarden, Primary or Secondary School)
- ☐ Not for Profit group or organisation based in the LG area
- ☐ Not for Profit group or organisation regardless of origin or base location
- ☐ Dance School providing recreational and entry level training

* 30. Does the package hire rate for COMMUNITY USE include

	Yes	No
Electricity	◯	◯
Air-conditioning	◯	◯
Basic Lighitng Equipment	◯	◯
Basic Audio Equipment	◯	◯
Duty Technician / Technical Staff	◯	◯
Duty Manager	◯	◯
Box Officer Ticket Seller	◯	◯
Cleaning	◯	◯

* 31. If you charge for the provision of marketing and publicity services please provide details. Marketing and publicity services are

◯ not provided by the venue

◯ basic advice and support is provided at no additional cost

◯ is provided and charged at a set hourly rate

◯ is provided as a percentage of the value of paid advertising placed for the hirer

* 32. If you charge for cleaning staff in addition to standard venue rental charges please provide details. Additional cleaning is

◯ not charged

◯ charged at a flat rate per performance of less than $150

◯ charged at a flat rate per performance of between $150 and $300

◯ charged at a flat rate per performance of more than $300

◯ charged at an hourly rate and based on actual time to clean

◯ only charged in extraordinary circumstances and at an hourly rate and based on actual time to clean

11

APACA

7. Staff Recharge Rates - Front of House

These are the rates charged to hirer for the services provided by venue staff in Front of House.

33. Staff recharges rates per hour charged to the hirer

	Rate $/hr	Min. Call
Duty Manager		
Usher		
Merch. Seller		
Box Office		
Stage Door		

34. Minimum Front of House staff level for events for each performance venue
(include only those staff that are at the hirer's expense i.e. if the venue provides the box office ticket seller at the venue's expense do not include that position in this question)

	Duty Manager	Ushers	Ticket Seller	Stage Door Keeper
Theatre performances				
Unticketed events				

12

APACA

8. Staff Recharge Rates - Production

These are the rates charged to hirer for the services provided by venue staff in the Production department. If you have only one rate for production staff please enter this at the Duty Technician question below.

35. Staff recharges rates per hour charged to the hirer

	Rate $/hr	Min. Call
Technical Manager		
Duty Technician		
Senior Technician		
Technician		

* 36. Minimum Production staff level for events for each performance
The answer "One for each department in use" means that if a hirer is using the venues lighting, sound or mechanical systems one venue technician a minimum of one of the head technicians must be engaged

	Technical Staff
Theatre performances	
Unticketed events	

37. Award overtime penalties are

- applied to the above rates and charged to the hirer
- included in the above flat rates

13

APACA

9. Box Office Services

38. Box Office system used (you can select more than one)

- [ ] ProVenue / Tickets.com
- [ ] TIKEX
- [ ] Ticketek
- [ ] Bass
- [ ] TicketServ
- [ ] Enta
- [ ] SABO / Seat Advisor
- [ ] Manual hard tickets
- [ ] Tesatura
- [ ] TryBooking

Other (please specify)

39. Does the venue have external Box Office outlets removed from the primary venues

◯ No ◯ Yes, 1 ◯ Yes, 2 ◯ Yes, 3 ◯ Yes, 4+

40. Number of points-of-sale in the primary box office

◯ 1 ◯ 2 ◯ 3 ◯ 4 ◯ 5 or more

41. Of the methods of sale available at your Box Office please estimate the percent of sales by each method

	% of Sales
Counter Sales	
Telephone	
Online	
External Agency	
Outlet	

15

10. Box Office Services

42. Booking Fees
(select the booking fee that applies to a ticket with the following net values)

	Commercial	Community
Complimentary		
$15		
$25		
$50		
$75		
$100+		

43. Event Build Fee

	Rate	per
Original build		
Edit on sale event		

Please provide details of any additional box office charges
For the purposes of this question an 'Inside Charge' is a charge included in the public selling price of a ticket and is not disclosed to the patron and an 'Outside Charge' is a charge that is added to this selling price and is disclosed.

16

44. Other box office charges

	Fee	per	max. per transaction	Type ie Paid for
Charge for tickets sold by telephone				
Charge for tickets sold online				
Charge for counter sale at primary box office				
Charge for counter sale at external agencey				
Refund at the request of the patron				
Refund as a result of cancellation				

45. Merchant fee for tickets purchased on purchase cards

	Charged to
Credit Card	
Debit Card	
Paypal	

46. If you offer a subscription season please indicate the number of subscribers ?

47. If you offer a subscription season please indicate the number of shows in your subscription package?

48. Please provide details of any Membership, Friends or loyalty program

	Type	No. members
-		

17

APACA

11. Venue Catering Charges

49. Food and Beverage services

	Service provided	by
Beverage / Bar Services		
Food- Light Meals / Snacks		
Full restaurant meals		
Function Catering		
Backstage Catering		

18

12. Staff Recharge - other services

50. Commission Rates

	Charge
Programs	
Other merchandise	
Equipment Hire	

APACA

13. Administration Charges

51. Are any of the following functions or services outsourced to the building owner or parent organsiation i.e. Local Government. Please indicate if the cost of providing this service is recorded against the operating expenditure of the venue.

	Provided at No Cost	On Charged to Venue
Finance	☐	☐
Payroll	☐	☐
Human Resources	☐	☐
Marketing	☐	☐
Building Maintenance	☐	☐
Cleaning	☐	☐
Building Security	☐	☐

52. How many house seats do you hold per performance when the venue is hired by an external party

14. Salary - Venue Manager

53. Venue Manager Salary (Cash component only)

54. Overtime is

- paid in addition to Salary above
- included in Salary
- is remunerated by the provision of TOIL (Time Off in Lieu)
- is remunerated by a combination of TOIL and paid overtime
- is largely ignored by my employer despite all of their 'talk' of work life balance

55. On average over the past three months how many hours has the Centre Manager worked per week

- <35 hours
- 35 - 40 hours
- 40 - 45 hours
- 45 - 50 hours
- more than 50 hours

56. In many centres the person that has direct management responsibility for the Performing Arts program and venue often has other operational responsibilities. Please indicate if you also manage the following programs

- [ ] Art Gallery / Visual Arts programs
- [ ] Events and Community Celebrations
- [ ] Community Arts programs
- [ ] Heritage programs
- [ ] Showgrounds
- [ ] Stadiums

Other (please specify)

21

57. The employment / engagement is under the terms of an

- industrial award
- enterprise agreement
- private contract of employment
- contract for service via a separate legal entity

Other (please specify)

58. A motor vehicle is

- provided by the employer for commuter (private to and from work) use only
- provided by the employer for full private use
- not provided by the employer but an additional payment is made to the employee
- not provided by the employer but an additional payment is made to the employee which must be used to lease a suitable vehcile ie a novated lease
- not provided by the employer

59. Where superannuation is provided at a level above the legislative requirement (ie 9%) please provide details.

(This is the amount paid by your employer - do not include your pre-tax salary sacrifice or post-tax private contribution)

60. Is a performance bonus paid

- Yes
- No

61. Please provide details of any other remuneration or non-cash benefits provided. You may select more than one option.

- [ ] Mobile phone - business calls only
- [ ] Mobile phone - all calls
- [ ] Laptop available for private use
- [ ] Uniforms
- [ ] Clothing allowance
- [ ] Subsidized residential housing
- [ ] Professional memberships
- [ ] Travel for professional development

62. Total value of the package provided (including all benefits and superannuation)

23

APACA

15. Salary - Venue Staff

63. Staff Salary and Conditions

	Salary	Overtime is
Operations Manager/Director		
Technical Manager/Director		
Box Office/FOH Manager		
Marketing Manager/Director		
Program Manager		
F&B Manager		
Finance Manager		
HR Manager		
Admin. Officer		

24

16. Employment Agreements

64. Venue staff (as above) are engaged under the terms of

	Type of Agreement
Management	
Admin. staff	
Technical	
Front of House	
Food and Beverage	

65. Provide the total number of FTE (Full-time equivalent) employees, including casual staff and contractors in each department.

For example, if you employed 3 casual staff for 20 hours per a week that would be 3 x 20=60 hours, which is 1.5 FTE's.

Operations	
Technical	
Box Office	
Marketing	
Public Programs	
Food and Beverage	
Finance Manager	
Administration	

66. Provide the TOTAL number of FTE (Full-time equivalent) staff employed across your entire organisation (including yourself, contracted and casual staff).

25

67. If the venue utilises volunteers in what areas are they engaged

- [ ] Front of House
- [ ] Food and Beverage
- [ ] Technical
- [ ] Administration

68. If the venue utilises volunteers, please enter the total number of hours worked per annum in each area in which they are engaged [please enter '0' if no hours are volunteered]

Front of House	
Food and Beverage	
Technical	
Administration	

26

17. Programming / Cultural Plan

69. Does your centre have a written programming policy or plan?

- ◯ Yes
- ◯ No

Other (please specify)

70. Does your centre have a written audience development plan or strategy?

- ◯ Yes
- ◯ No

Other (please specify)

71. Does your Local Council have a Cultural Plan?

- ◯ Yes
- ◯ No

Other/Comment:

APACA

18. Cultural Plan

72. Does your Local Council Cultural Plan refer to the activities or goals of your centre?

- ◯ Yes
- ◯ No

Other/Comment (please specify)

APACA

19. THANK YOU

Thank you for completing this survey.

Subject to the timing of responses, we hope to be able to distribute the survey to participating members by the end of April. Thanks for your patience.

73. Can you please confirm that you have completed this part of the survey?

- ◯ Yup all done
- ◯ Nup still lookin' - I'll be back to add more responses

74. Do you have any comments regarding questions that you found difficult to answer ?

75. Any other comments

29

Appendix 7 - Examining Perth’s Performing Arts Infrastructure: Committee for Perth (2013)

Committee for Perth

Examining Perth's Performing Arts Infrastructure

Actions to position Perth as a global leader in the arts

June 2013

About the Committee for Perth

The Committee for Perth is a member funded think tank focused on maintaining and improving the liveability of the Perth metropolitan region by ensuring its vibrancy, economic prosperity, cultural diversity and sustainability.

We currently have over 90 members representing a broad cross sector of the business community, civic institutions and local government and rely solely on our members' financial contribution to enable us to undertake the work, research and activities that we do. A full membership listing is included as Appendix F.

The role of the Committee for Perth is to advocate on issues that we believe will help us realise our vision for Perth and we have developed a unique model of advocacy through which this is achieved. Regardless of whether a project is our initiative or one implemented by government or others, we remain informed advocates for projects that we believe will benefit future Perth whatever stage they are at in concept or development.

Further information about the Committee for Perth and our work can be obtained from our website at www.committeeforperth.com.au

(2013) Examining Perth's Performing Arts Infrastructure,
The Committee for Perth, Perth

Foreword

In late 2008 the Committee for Perth released its landmark report *A Cultural Compact for Western Australia, the 10 year challenge (the Compact)*. In the report we invited the arts and cultural sector, the Western Australian Government and other political parties, the business and philanthropic sectors and Local Government Authorities to commit to work through the report's recommendations together for 10 years to revitalise our capital city, regional cities and towns and to achieve:

- a vibrant state where arts and cultural appreciation and activity are part of everyday life for all Western Australians;
- acknowledgement of the importance of Aboriginal culture and the arts to the future fabric of Western Australia;
- the engagement of young artists who chose to stay, return to, or visit because they are encouraged and supported within an incubator environment;
- a dynamic capital city that all Western Australians are proud of; and
- bold and courageous art that places WA firmly on the international stage.

Since *the Compact* was released there has been a significant re-energisation and coalescence across the sector itself, governments and the business and philanthropic sectors which has brought the vision closer to reality.

In *the Compact* we noted the need to address deficiencies in arts infrastructure. This was not addressed in *the Compact* project because we understood that the Department of Culture and the Arts was undertaking an audit of arts and cultural infrastructure across the state which would inform the development of an infrastructure plan. Many years later we await that plan which we believe would be a key enabler to fully realising the vision.

Without such a plan, the conversations about needs, wants, gaps and desires continues without direction. The Committee for Perth therefore decided to commission this quantitative audit of performing arts venues in Perth as a first step in examining the region's major performing arts venues in their current context and against the backdrop of decades of predicted population growth. The report also compares how Perth fares in terms of infrastructure provision against a number of other cities.

It is our desire that the research efforts in this report, which culminate in a number of recommendations, again act as a catalyst for renewed energy and focus in planning for the future. We have identified that additional research will be required to progress this issue including a qualitative analysis of venues, research into venue cost and funding and broad stakeholder consultation to determine the needs and aspirations of the performing arts sector.

We are confident that by highlighting the major infrastructure gaps in Perth's current and future infrastructure this report will lay the foundation for further investigation and action that leads to a genuinely vibrant and sustainable arts and cultural sector for the benefit of all Western Australians.

Marion Fulker
CEO, Committee for Perth

Table of Contents

Executive Summary 3

1. Introduction 6

2. Methodology 7

3. Demand for Arts & Culture in Perth 8
    - 3.1 Attendance at Performing Arts Venues in Western Australia 9
    - 3.2 International Performing Arts Trends 10
    - 3.3 Current Attendance Trends in Perth 10
        - 3.3.1 Perth International Arts Festival 11
        - 3.3.2 Fringe World Festival 11
    - 3.4 Contribution to the Economy 12
    - 3.5 Population Growth 13
    - 3.6 Tourism Growth 13
    - 3.7 Key Findings 14

4. Audit of Perth's Existing Arts Facilities 15
    - 4.1 Index of Venues and Map References 15
    - 4.2 Summary of Venues Audited 17
    - 4.3 Summary of Audited Venues by *Directions 2031* 19
    - 4.4 Stakeholder feedback 20
    - 4.5 Key Findings 20

5. Benchmarking Perth's Performing Arts Infrastructure 21
    - 5.1 Benchmark Data: Number, Type and Capacity of Venues 22
    - 5.2 Observed Trends in Performing Arts Infrastructure 26
    - 5.3 Key Findings 27

6. Conclusions and Recommendations 29
    - 6.1 Conclusions 29
    - 6.2 Recommendations for State Government 30
    - 6.3 Considerations for the arts and cultural sector 30

Appendices 32

Appendix A: Full List of References 33

Appendix B: Venue Summaries, Performing Arts Perth 34

Appendix C: Project Team 104

Appendix D: Member Acknowledgement 106

Appendix E: Gathering Issues 108

Executive Summary

Cities today are increasingly competing with each other. They compete to attract investment, people, businesses and company headquarters, along with sporting and cultural events. Cultural prowess and economic success are becoming interlinked and cultural vibrancy is recognised as central to a city's liveability.

In this context, high quality cultural facilities are integral to any liveable, modern city, and while Perth is considered highly liveable in terms of a high standard of living, the area of arts and culture has not traditionally been viewed as one of the region's strengths.

In recognition of the role cultural facilities play in developing a competitive city as well as the importance of effective long term planning for cultural infrastructure needs, the Committee for Perth commissioned two pieces of work :-

- an audit of major performing arts infrastructure in the Perth and Peel region; and
- an analysis of the audit in order to benchmark Perth's major performing arts infrastructure offerings against other cities.

This report is the combined findings of those research projects. Purely quantitative in nature, it is intended to help the Western Australian government in planning for Perth's future performing arts needs. It also will assist the Committee for Perth and other associated organisations in advocating for improved cultural infrastructure in Perth.

Perth's cultural sector is flourishing. Attendance at performing arts events is increasing and there is significant evidence that Perth's people not only have a growing appetite for arts and culture but that there remains untapped potential for audience growth.

In addition, ongoing rapid population and economic growth could direct Perth towards attendance growth up to or even in excess of 34% by 2021, meaning that Perth's existing cultural infrastructure, some of which is already struggling to meet demand, will come under enormous pressure over the next decade.

Furthermore, over the next 40 to 50 years Perth will need adequate performing arts infrastructure to meet the demand of an estimated population of four million people, meaning that Perth will need infrastructure that is of comparable size and quality to that in metropolitan Melbourne today. This means that the number of performing arts venues in Perth will need to approximately double.

In addition to this, Tourism Western Australia has a target to double the value of tourism in Western Australia by 2020. Achieving this target requires positioning WA as a recognised events destination for locals and visitors, and providing every visitor with the opportunity to have an Indigenous cultural experience – both goals that are likely to increase demand for cultural facilities and specifically highlight the need for a world-class Indigenous cultural centre in Perth.

The report includes an audit of 35 venues in the Perth and Peel region with a seating capacity of 200 or more that are currently used as performing arts venues. Of these, 22 are indoor venues whose primary function is for the performing arts and 13 are outdoor venues or stadiums, 6 of which do not have performing arts as their primary function but do stage large concerts and festival style events.

In addition to the audit, a smaller selection of 21 venues, each with a seating capacity of 500 and a location within 20 kilometers of the Perth city centre, has been used to provide a comparison of performing arts infrastructure in Perth with that in seven other national and international cities. This comparison indicates that Perth generally compares favourably with the other cities on a number of venues and seating per capita basis but it also identifies some major infrastructure gaps.

In particular it has found that:

- Perth is very well served in some infrastructure categories (particularly large outdoor venues) but relatively poorly served in others.
- Perth appears to be relatively well served with dance and drama theatres.
- Perth has a relatively large number of arenas/large multipurpose venues compared to benchmarked cities.
- Perth has a comparatively high proportion of stadiums that are primarily for sporting use but are also occasionally used for performing arts events. This may reflect the popularity of outdoor events in the region, but could also be a reflection on the lack of large purpose built venues in the region, particularly prior to the opening of the Perth Arena.
- Perth has an undersupply of lyric theatres, with currently only one lyric theatre and no dedicated lyric theatre for musicals.
- Perth has an undersupply of concert halls with 0.5 venues per million people compared to an average of 1.35 venues per million across the benchmarked cities.
- Perth has a slight undersupply of contemporary music venues.

The report indicates that investment in some types of performing arts infrastructure is needed to meet current demand in Perth and to enable performing arts attendance rates to continue to grow.

It is also evident that very substantial medium and long term investment in performing arts infrastructure will be required to meet the demand generated by population growth – investment that should also aim to position Perth as a global leader in the arts.

On the basis of the report findings, we make the following recommendations to the State Government:

1. The State Government prepares a long term Plan for Arts and Cultural Infrastructure that positions Perth as a global leader in arts and culture.
2. The Infrastructure Plan should be completed within 12 months and funding decisions flowing from the Plan commence in the 2014-15 Budget
3. Priority infrastructure requirements to be addressed in the Plan include:
   - the development of an Indigenous cultural centre in Perth that includes performing arts space in order to meet the demand for Indigenous cultural events both within the Indigenous communities and the tourism sector.
   - the development of a new major lyric theatre in Perth that is suitable for large scale opera, ballet and musical theatre.
   - whether there is a need for an additional concert hall or recital hall.
4. The plan should develop locational criteria for major infrastructure to ensure that it makes a positive contribution to the urban landscape and capitalises on the potential for city activation and economic benefits.

The scope of works of this report has been to analyse the commercial performing arts infrastructure that is presently in use in the Perth and Peel region with an audience capacity of over 200, offering ticketed events and available for public hire.

Following a review of the draft report by the Committee for Perth's Revitalising Working Group and representatives of the Chamber of Arts and Culture, it is felt that the report gives rise to other considerations that require further examination from within the sector. These include:

- Should additional work be undertaken to examine in detail the demand for dance and drama theatres in Perth to identify whether there remains a shortage of supply; whether there is a shortage of high quality theatres; and whether there is a need for additional rehearsal space in the region?
- Should additional work be undertaken to examine cultural infrastructure funding in Perth in comparison to other cities and identify potential funding opportunities to ensure that existing, new and renewed cultural infrastructure remains financially viable through its projected life cycle?
- Is the current situation in regards to suitability, availability and affordability of performance and rehearsal venues acceptable?
- Are adequate considerations for costs of and funding for the ongoing maintenance and improvement of existing venues in place?
- Would a further study into global audience and live performance trends and demographics provide useful information as to the nature of the performing arts venues that are likely to be in demand in the future?
- Should consideration be given to the development of a proposal to incentivise developers to provide a lyric theatre / rehearsal space and arts administration facility as part of a precinct / arts hub in the Elizabeth Quay waterfront project area?

1.0 Introduction

In this era of globalisation, cities are increasingly competing with each other. They compete to attract investment, people, businesses and company headquarters, along with sporting and cultural events. Cultural prowess and economic success are becoming interlinked and cultural vibrancy is recognised as central to a city's liveability.

High quality cultural facilities are therefore integral to a liveable, modern city. While Perth is considered highly liveable in terms of a high standard of living, the area of arts and culture has not traditionally been viewed as one of the region's strengths. Perth has long been criticised for lacking vibrancy and recreation choice and as a community we smarted when Lonely Planet labelled our city 'dullsville'.

The Committee for Perth is a think tank and advocate for a bright future for the Perth region. Our vision of this future is one in which Perth becomes increasingly innovative, culturally vibrant and forward thinking.

The Committee supports the aspirations of local arts champion, the Chamber of Arts and Culture to 'imagine Western Australia as a global leader in the arts'.

Ensuring that Perth has high quality arts and cultural infrastructure is integral to this aspiration.

Recognising this importance, the Committee for Perth commissioned Hames Sharley (WA) Pty Ltd to conduct an audit of major performing arts venues in the Perth metropolitan region and long-term research consultant to the Committee, Gemma Davis to analyse how well Perth fares.

This report is the combined findings of those research projects. It is intended to help the Western Australian government in planning for Perth's future performing arts needs. It also will assist the Committee for Perth and other associated organisations in advocating for improved cultural infrastructure in Perth.

The purpose of this report is therefore to examine existing and likely future demand for performing arts infrastructure in Perth as the region grows and changes; and to audit Perth's existing performing arts infrastructure to identify existing infrastructure gaps and priority needs. The report also aims to identify the likely performing arts infrastructure needed to make Perth a liveable and vibrant city into the future.

This report provides a comprehensive overview of major performing arts venues in Perth and enables comparison with other cities in Australia and overseas. The report:

- Provides an overview of the demand for and importance of arts and cultural activities and infrastructure to Perth and the Western Australian economy.
- Examines the findings of a comprehensive, desktop review of performing arts venues across Perth.
- Benchmarks Perth's performing arts infrastructure against that in other Australian capitals and cities overseas.
- Identifies infrastructure gaps in Perth.
- Makes recommendations on major performing arts infrastructure needs for the future.

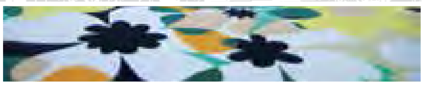
2.0 Methodology

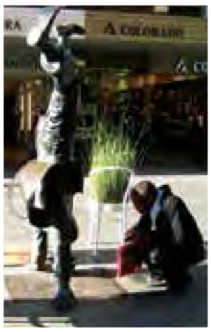
To provide a comprehensive review of supply and demand for cultural facilities a three stage methodology has been used to undertake this study. This has included:

1. A summary of performing arts demand and attendance trends and likely future demand growth.
2. An audit of existing performing arts venues and facilities in Perth and Peel focused on commercial venues that have a seating capacity of 200 or more, that offer ticketed performances and are available for public hire. The selection of venues considered was informed by discussion with the Department of Culture and the Arts. 35 venues from across the region met the required criteria and were included in the study.

   Each venue has been audited to achieve consistent data capture and includes: venue name; street address; Local Government Authority; primary and secondary purposes; stage configurations; operator and management arrangements; funding sources; seating capacity in all configurations; images of the exterior and interior of the facility; the year the venue was built, dates of significant renovations with an outline of the works undertaken; additional amenities within the facility such as bars, dining venues, exhibition spaces or meeting rooms.
3. A comparison of major performing arts venues in Perth with those in three national and four international cities using benchmark data from *Planning Sydney's Cultural Facilities* review prepared by Sweet Reason Pty Ltd in 2011 for the City of Sydney. The Sydney benchmark data only included venues located within 20 kilometres of the city centre with a seating capacity of 500 or more and so, in order to make a like for like comparison, we only used data from the 21 Perth venues that also meet this criteria.

   The comparison cities are:
   - Sydney
   - Brisbane
   - Melbourne
   - Manchester
   - Hong Kong
   - Copenhagen
   - Chicago





3.0 Demand for Arts and Culture in Perth

Perth's arts and cultural sector is flourishing. With a booming economy and expanding population, Perth's people have a growing appetite for arts and culture. The local arts and culture scene is in the midst of a period of renewed energy and creativity and the sector has more private sector support and champions than ever before.

Attendance statistics for some of Perth's major performing arts companies show they are experiencing solid attendance growth which in part has been assisted by investment in new infrastructure. This increase in patronage is bucking national and international trends of audience decline.

The huge success of new performing arts initiatives in Perth such as Fringe World Perth is encouraging a broader range of community participation and developing new arts and cultural enthusiasts.

Growing audiences when cities elsewhere are experiencing a drop in patronage, coupled with projections for continued population and economic growth for this region, signifies an opportunity for Perth to become a global leader in arts and culture.

However Perth is still fighting criticism for lacking vibrancy, sophistication and recreation choice, from its own residents, from national business and academic leaders[1] and from international 'liveability' surveys such as the Economist Intelligence Unit[2] and Mercer Consulting[3], both of which rate Perth relatively poorly against their culture, recreation and environment criteria.

These criticisms and negative perceptions should not be ignored as they have a direct negative impact on our own satisfaction with living in Perth; on Perth's national and international reputation; and on the region's ability to attract and retain talented people and investment dollars.

It is also evident that, despite the cultural attendance growth that has been achieved, Perth's cultural participation rates fall well below the nation's leader, the Australian Capital Territory, and there is potential for Perth to develop a significantly stronger cultural tourism sector.

This section provides a snap shot of attendance at performing arts venues and events in Western Australia and the Perth and Peel region based on the most recently available statistical data. It examines attendance trends and the benefits of cultural sector growth and provides indicators for the future.

[1] Wetzstein S (2010) *Perceptions of Urban Elites on Four Australian Cities: How does Perth compare?*, Committee for Perth, Perth www.committeeforperth.com.au

[2] Economist Intelligence Unit (2011) *Global liveability report*, EIU, London

[3] Mercer Consulting (2012) *Quality of Living Survey 2012*, Mercer LLC, New York

3.1 Attendance at Performing Arts Venues in Western Australia

Western Australia has not traditionally had a reputation as a cultural leader and statistics indicate that performing arts attendance in the state has been average in comparison with other states and territories.

In 2009-10, a total of 945,500 people or 53.7% of people aged over 15 years in Western Australia and 55.5% of people over 15 living in Perth attended a performing arts venue[4].

This is consistent with the national average of 53.6% attendance but is behind the nation's leader, the Australian Capital Territory which achieved 63.9% attendance (among those aged 15 years and older).

Comparing attendance in 2005-06 with that in 2009-10 indicates that overall rates have remained relatively stable.

In 2009-10, 16% of people aged over 15 in Western Australia attended a theatre performance, compared to 16.8% in 2005-06; 12% went to a musical or opera, compared to 14.8% in 2005-06; 9% attended classical music concerts compared to 10.8% in 2005-06; and dance performances attracted 11% of people in 2009-10 compared to 9.7% in 2005-06. In 2009-10 17% (compared to 17.6% in 2005-06) of people in the state attended other types of performing arts[5/6].

Younger people are the most culturally active age group in the state. In the 12 months prior to April 2009 over two thirds (72%) of Western Australian children aged 5 to 14 years attended a public library, museum, art gallery or performing arts event at least once outside school hours[7].

Of people aged over 15 years, individuals in the 15 to 34 year age group are the most culturally active and are the most likely people to attend a performing arts event, with annual attendance rates of between 64.4% (25 to 34 year olds) and 68.4% (18 to 24 years olds). Popular music concerts are the most attended performing arts events by people in these age groups[8].

Indigenous Western Australians are also highly culturally engaged. In 2008, one third (29%) of Indigenous persons aged 15 years and older living in Western Australia participated in at least one Indigenous creative activity, with the most popular activities being art and craft and writing or story-telling; while more than two thirds (70%) attended at least one Indigenous cultural event[9].

[4] Australian Bureau of Statistics (2013) Arts and Culture in Australia, A Statistical Overview Category Number 4172.0, Commonwealth of Australia, Canberra

[5] Australian Bureau of Statistics (2012) *Attendance at Selected Cultural Venues and Events 2005-06, Catalogue Number: 4114.0*, Commonwealth of Australia, Canberra

[6] Australian Bureau of Statistics (2007) *Attendance at Selected Cultural Venues and Events 2005-06, Catalogue Number: 4114.0*, Commonwealth of Australia, Canberra

[7] National Centre for Culture and Recreation Studies, Australian Bureau of Statistics (2012) Culture Report 2012 for Western Australia, Western Australian Department of Culture and the Arts, Perth

[8] Australian Bureau of Statistics (2012) *Attendance at Selected Cultural Venues and Events 2005-06, Catalogue Number: 4114.0*, Commonwealth of Australia, Canberra

[9] Australian Bureau of Statistics (2009) *2008 National Aboriginal and Torres Strait Islander Social Survey (NATSISS)*, Commonwealth of Australia, Canberra

3.2 International Performing Arts Trends

There is international evidence that the structure of the performing arts system is undergoing a fundamental shift, with the recorded and broadcast performing arts industry becoming more concentrated; increasing numbers of small, local, low budget organisations; and a few very large non-profit and commercial organisations growing larger and staging ever more elaborate productions on a global scale[10].

Within this paradigm shift, midsized non-profit organisations are expected to experience the greatest difficulties in attracting adequate revenues to cover their costs and opera companies, symphony orchestras, ballet companies and theatre groups serving small and medium-sized cities in particular will be facing realities of ageing audiences, escalating costs, and static or even declining funding forcing them to rethink their primary mission – the audiences they want to reach, and their organisational structure[11].

3.3 Current Attendance Trends in Perth

There is evidence that this shift is having some bearing on performing arts attendance in Australia and in major east coast cities. Yet the story for Perth is a good one in that overall performing arts attendance in Perth is rising and, contrary to national and international trends, this growth is occurring across a wide range of performing arts types and organisations.

A 2011 Australia wide survey of live entertainment industry ticket attendances and revenues indicates that in 2010 and 2011 Western Australia accounted for between 10% and 11% of the live entertainment industry (behind New South Wales 34-36.5%; Victoria 31-34%; and Queensland 12.5-12%)[12].

However the same survey indicates that Western Australian attendance figures are significantly higher in some categories than this proportion suggests with the state accounting for 12.8% of attendance at ballet and dance performances; nearly 33% of multi-category festival attendance (the highest attendance figure in Australia); and approximately 16.5% of attendance at single category festivals.

There are also indicators that Western Australia's share of the performing arts market is increasing. For example, in 2011 1,788,262 tickets were sold to live performances in Perth compared to 1,468,882 tickets in 2009, an increase of 22%.

An analysis of 2012 ticket and audience figures for individual companies prepared by media organisation *Crikey* also indicates that while audience figures for many of the major performing arts companies and organisations have been stagnating in recent years, Western Australia's major theatre, ballet and opera companies have experienced solid growth[13].

The analysis compared data from 17 large opera, music, theatre and dance companies from 2007 to 2011. It found that most major Australian performing arts companies are shedding audiences, and attendances in total have declined by 6% over the past five years.

Of the 17 companies surveyed, 10 have seen declining audiences since 2007. This includes all six of the largest performing arts companies with audiences of more than 200,000 annually. Australia's largest performing arts organisation, Opera Australia, is down about 130,000 attendances from its 2008 peak.

Yet Perth companies are an exception. For example *Crikey* reported that, from 2007 to 2011, Black Swan Theatre Company had more than doubled its footprint.

[10] McCarthy, Brooks A, Lowell J, Zakaras L (2001) *The Performing Arts in the New Era*, RAND Corporation, Santa Monica

[11] Ibid.

[12] Ernst & Young (2011) *Ticket Attendance and Revenue Survey*, Live Performance Australia, Melbourne

[13] Ibid

In 2011, paid attendance to Black Swan productions increased by 60%, three of the company's five major productions reached sell out capacity and the season of one production was extended for an additional week to meet popular demand. Attendances as a percentage of capacity also grew by 8% (to 85%) despite the company moving performances to the newly opened State Theatre Centre's 575 seat Heath Ledger Theatre from the 427 seat Playhouse Theatre, indicating that the company's growth was most likely previously constrained by seating capacity[14].

The Western Australian Symphony Orchestra and the Western Australian Ballet have also experienced more modest but very healthy gains.

For example, the Western Australian Ballet achieved a 15% increase in box office income in 2011; a 5% increase in main stage attendance and a 220% increase in education and access participation from 2008 to 2011[15].

Similarly the Western Australian Symphony Orchestra achieved a 4.5% increase in revenue from subscriptions and ticket sales from 2010 to 2011[16].

It is also evident from the annual reports of all three companies that the reported gains can be at least partially attributed to new creative directions and innovative strategies to engage with the community and build new audiences. These types of strategies are essential in the current age of shifting public and audience expectations and Western Australian creative industries are clearly showing leadership in adapting and capitalising on this change.

3.3.1 Perth International Arts Festival

The success of Perth's original festival, the Perth International Arts Festival (known as the Perth Festival) established in 1953 also demonstrates the appetite for arts and culture in Perth.

At the completion of the 2013 festival in March this year, with the Lotterywest Festival Films still to run, the Festival reported that it had exceeded its box office target of $4,800,000, reached a paid audience of about 190,000, and engaged approximately half a million people in festival activities and events[17].

Together, for a few months of the year, Perth Festival and Fringe World transform Perth into a vibrant melting pot of creativity - reaching vast audiences and demonstrating that Perth's people are hungry for new cultural experiences.

3.3.2 Fringe World Festival

An additional boost to audience numbers has been achieved through the establishment of the staggeringly successful Fringe World festival.

The inaugural Fringe World festival was held in 2012. According to an impact assessment of the 2012 festival prepared by BOP Consulting, Fringe World attracted audience numbers in excess of 150,000 people in its first year, 50,438 of whom attended ticketed performances, generating box office revenue of over $1,038,500[18].

But that was just the start. Figures from the 2013 Fringe World indicate that this year's ticket sales more than doubled to 110,000 with more than $2,000,000 spent through the box office and total attendance (to both ticketed and non-ticketed events) reaching 215,000[19].

[14] Ernst & Young (2009) *Ticket Attendance and Revenue Survey*, Live Performance Australia, Melbourne

[15] Western Australian Ballet Company (2012) *Annual Report 2011*, Western Australian Ballet Company, Perth

[16] Western Australian Symphony Orchestra (2012) *WASO Annual Report 2011*, Western Australian Symphony Orchestra, Perth

[17] Perth International Arts Festival (2013) Media Release Perth International Arts Festival Draws to a Close 4 March 2013, http://www.perthfestival.com.au/About/Media/Media-Releases/

[18] BOP Consulting (2012) *Impact Assessment of the Fringe World Festival*, Artrage, Perth

[19] Artrage (2013) Fringe World Festival 2013 Results Snapshot, Unpublished

Yet, perhaps even more significant is the fact that Fringe World appears to have successfully tapped into new cultural audiences in Perth, substantially increased city vibrancy, made people feel safe in the city centre, given people a new sense of pride in the city and helped to re-invigorate Perth's arts and cultural scene.

A survey of more than one thousand 2012 Fringe World audience members and more than two thousand eight hundred 2013 attendees indicated that:

- 44% of 2012 respondents and 49% of 2013 respondents are not regular attendees at arts events.
- 76% of 2012 respondents and 70% of 2013 respondents would have stayed at home if Fringe World had not been happening.
- 86% of respondents in 2012 and 90% of 2013 respondents said that Fringe World increased their pride in Perth.
- 83% of 2012 respondents and 89% of 2013 respondents said that Fringe World promoted Perth as a city that is globally connected.
- 99% said that they intended to attend Fringe World again in 2013 and 2014[20].

This shows that Perth's people see arts and culture as central to Perth's development as a vibrant, competitive, globally connected city, and that new events like Fringe World are making a contribution to the city that goes far beyond entertainment or dollars and cents – they are positively contributing to Perth's competitive identity. Critically, it also indicates that there is untapped demand for arts and cultural events in Perth.

Fringe World Director Marcus Canning has also observed that Fringe World has had a positive impact on Perth's local arts and culture scene.

"From the performing arts sector, one thing that I've really been pleased with at the Fringe this year is the growth of local practitioners plugging in," he said, saying local performers "saw the success of the 2012 festival and have all really jumped on board"... "The excitement is palpable."[21]

3.4 Contribution to the Economy

Cultivating Perth's arts and cultural resurgence is in the best interests of both our society and our economy.

The arts and cultural sector is a significant and growing part of the economy. In 2009-10 Australian households spent four per cent of their income—more than $19 billion—on arts and cultural goods and services, demonstrating the economic value of culture in everyday life[22].

In Perth, a 2007 study estimated the direct output of Perth's creative industries to be $4.6 billion, and total value (including flow on effects) was estimated to be in excess of $10.6 billion. Of this the music and performing arts sectors generated an estimated $331 million in economic output[23].

It is reasonable to assume that this output is likely to have increased significantly in the past 6 years, with Fringe World alone estimated to have generated spending within the Perth economy (including application of relevant gross value added multiplier) of over $14.5 million in its first year[24].

[20] Ibid.

[21] Eltham B, (2013) *And the centre of arts innovation is … Perth*, Crikey 15 February 2013, www.crickey.com.au

[22] Australian Government (2012) *Creative Australia – The National Cultural Policy*, Commonwealth of Australia, Canberra http://creativeaustralia.arts.gov.au/full-policy/

[23] Telsis Consulting et al (2007) *Perth's Creative Industries – An Analysis, Department of Culture and the Arts*, Government of Western Australia, Perth

[24] BOP Consulting (2012) *Impact Assessment of the Fringe World Festival*, Artrage, Perth

3.5 Population Growth

Population growth alone will drive demand for more arts and cultural activities, events and infrastructure in Perth's future, and this growth is occurring at a rapid pace.

At June 2011, the population of Greater Perth was 1.83 million people[25], which was 78% of the state's total population. Between 2001 and 2011, Greater Perth increased by 380,100 people, or 26%. This was the fastest growth of all capital cities in Australia[26].

It is further predicted that Perth will grow to a population of between 2.1 million and 2.45 million by the year 2021 and between 2.8 million and 4.2 million by 2056[27]. Based on historic growth patterns in Perth and the economic outlook for the region, we believe that a medium to high growth scenario is most likely.

This means that, even if performing arts attendance rates remain the same, Perth's performing arts sector will need to cater for audience growth of between 24% and 34% just to keep pace with growth needs over the next eight years.

Longer term it is reasonable to expect that Perth will need to cater for growth in demand of approximately 80% to more than 100% by 2056.

Accommodating this demand will require a doubling in the capacity of our performing arts infrastructure in just over 40 years - meaning that what Perth has slowly built over more than 100 years now has to be reproduced in just 40.

3.6 Tourism Growth

It is fair to assume that what is good for residents is also good for visitors. Therefore it can be expected that as Perth grows so too will the number of visitors that the region attracts.

National projections for Perth's tourism sector predict only modest growth however Tourism Western Australia has a target to double the value of tourism in Western Australia - from $6 billion a year in 2010 to $12 billion a year by 2020[28].

This is a target which the organisation believes is achievable and will require the development of seven 'strategic pillars' which include positioning WA as a recognised events destination for locals and visitors and providing every visitor with the opportunity to have an Aboriginal tourism experience - both goals in which the arts and cultural, and performing arts sectors should play an important role.

The need for an Indigenous cultural centre in Perth with the inclusion of a space for performing arts has also been well documented and supported, and the demand for such a centre is likely to substantially increase as demand for cultural tourism in the State grows.

[25] Australian Bureau of Statistics (2012) *2011 Census of Population and Housing*, Commonwealth of Australia

[26] Ibid.

[27] Australian Bureau of Statistics (2011) *Regional Population Growth Catalogue Number: 3218.0*, Commonwealth of Australia, Canberra

[28] Tourism Western Australia (2012) *Annual Report 2011-12*, Government of Western Australia, Perth

3.7 Key Findings

- Perth's arts and cultural sector is thriving. Attendance at performing arts events is increasing and there is significant evidence that Perth's people not only have a growing appetite for arts and culture but that there remains untapped potential for audience growth.
- Perth's population is expected to increase by 24% to 34% (from 2011 to 2021) which will very significantly increase demand for performing arts in the region and place enormous pressure on existing arts and culture infrastructure over the next decade.
- Longer term it is reasonable to expect that Perth will need to cater for growth in population and associated arts and culture demand of between 80% and 100% by 2056 – meaning that the region will need to effectively double its infrastructure capacity in just 40 years.
- Evidence suggests that performing arts attendance has already increased in the past three years with three of the state's top performing arts companies reporting solid growth.
- The strong growth reported by State Theatre Company Black Swan in 2011 coincided with the opening of the new State Theatre Centre, which significantly increased performance seating capacity.
- Continued growth of performing arts companies in the medium to longer term could be constrained by lack of seating capacity within existing venues.
- The Perth International Arts Festival performances and events continue to reach very large audiences and engage close to one third of the region's population, indicating that there is broad demand for arts and cultural activities.
- Perth's Fringe World has delivered a major boost to the city and the local arts and cultural sector by attracting large, new audiences and activating the central area and reinvigorating the local arts and cultural scene.
- Indigenous Western Australians are among the most culturally active in the State, with more than two thirds of Indigenous people aged over 15 participating in at least one Indigenous cultural event per annum, reinforcing the need for Perth to have its own dedicated Indigenous performing arts space.
- There is widespread acknowledgement of the need for an Indigenous Cultural Centre that includes performing arts space in Perth to meet local Indigenous, non-Indigenous and tourist demand for Indigenous performing arts and culture. It is also evident that demand for a dedicated Indigenous cultural space is likely to increase with population and tourism growth, and specifically with growth in cultural tourism.
- WA Tourism has a target to double the value of tourism in WA by 2020 which is likely to increase demand for arts and culture in the Perth region.
- The Tourism WA strategy to grow tourism includes goals to raise WA's role as an event destination and deliver Aboriginal tourism experiences to visitors – both goals in which the arts and cultural sector can play a vital role.

4.0 Audit of Perth's Existing Performing Arts Facilities

In order to identify whether Perth's existing performing arts infrastructure is adequate to meet current demand and what investment will be required to meet demand in the medium and long term, the Committee for Perth commissioned Hames Sharley Pty Ltd to undertake a major audit of existing performing arts venues and facilities in Perth and Peel. The audit focused on commercial venues that have a seating capacity of 200 or more, that offer ticketed performances and are available for public hire. The selection of venues considered was informed by discussion with the Department of Culture and the Arts.

35 venues from across the region met the required criteria and were included in the study, ranging from intimate indoor theatre spaces to large outdoor arenas and stadia.

4.1 Index of Venues and Map Reference Numbers

The following table provides reference to the numbering of the venues on the map (located on page 18). Detailed information on each venue is shown in alphabetical order in Appendix B.

Map No.	Venue	Address
1	Bassendean Steel Blue Oval	Cnr of Guildford Road and West Road, Bassendean
2	Belvoir Amphitheatre	1177 Great Northern Highway, Upper Swan
3	Challenge Stadium	Stephenson Avenue, Mount Claremont
4	Claremont Showgrounds	Equestrian Centre, Graylands Road, Claremont
5	Crown Theatre Perth	Great Eastern Highway, Burswood
6	Don Russell Performing Arts Centre	Murdoch Road, Thornlie
7	Fremantle Arts Centre	1 Finnerty Street, Fremantle
8	Fremantle Town Hall	8 William Street, Fremantle
9	His Majesty's Theatre	825 Hay Street, Perth
10	Joondalup Arena	Kennedya Drive, Joondalup
11	Kalamunda Performing Arts Centre	48 Canning Road, Kalamunda
12	Kings Park	Fraser Avenue, Kings Park
13	Koorliny Theatre	20 Sulphur Road, Kwinana
14	Mandurah Performing Arts Centre	Ormsby Terrace, Mandurah
15	Metcalfe Theatre at the Empyrean	12 Lake Street, Northbridge
16a	NIB Stadium	310 Pier Street, Perth
16b	Dolphin Theatre	UWA, 35 Stirling Highway, Crawley
16c	New Fortune Theatre	UWA, 35 Stirling Highway, Crawley
16d	Octagon Theatre	UWA, 35 Stirling Highway, Crawley
16e	Sunken Gardens	UWA, 35 Stirling Highway, Crawley
17	Winthrop Hall	UWA, 35 Stirling Highway, Crawley
18	Paterson's Stadium	Subiaco Road, Subiaco
19	Perth Arena	700 Wellington Street, Perth
20	Perth Concert Hall	5 St Georges Terrace, Perth
21	Perth Zoo	20 Labouchere Road, South Perth
22	Quarry Amphitheatre Reabold Hill,	Oceanic Drive, City Beach
23	Regal Theatre	474 Hay Street, Subiaco
24	Riverside Theatre,	PCEC, 21 Mounts Bay Road, Perth
25	Short Street Theatre	1 Short Street, Fremantle
26	Speigletent	Perth Cultural Centre (mobile venue)
27	State Theatre Centre	174-176 William Street, Perth (cnr Roe St)
28	Subiaco Arts Centre	180 Hamersley Road, Subiaco
29	Swan Park Theatre	Gray Drive, Midvale
30	The Bakery	233 James Street, Northbridge
31	WACA Stadium	WACA grounds, Nelson Crescent, East Perth

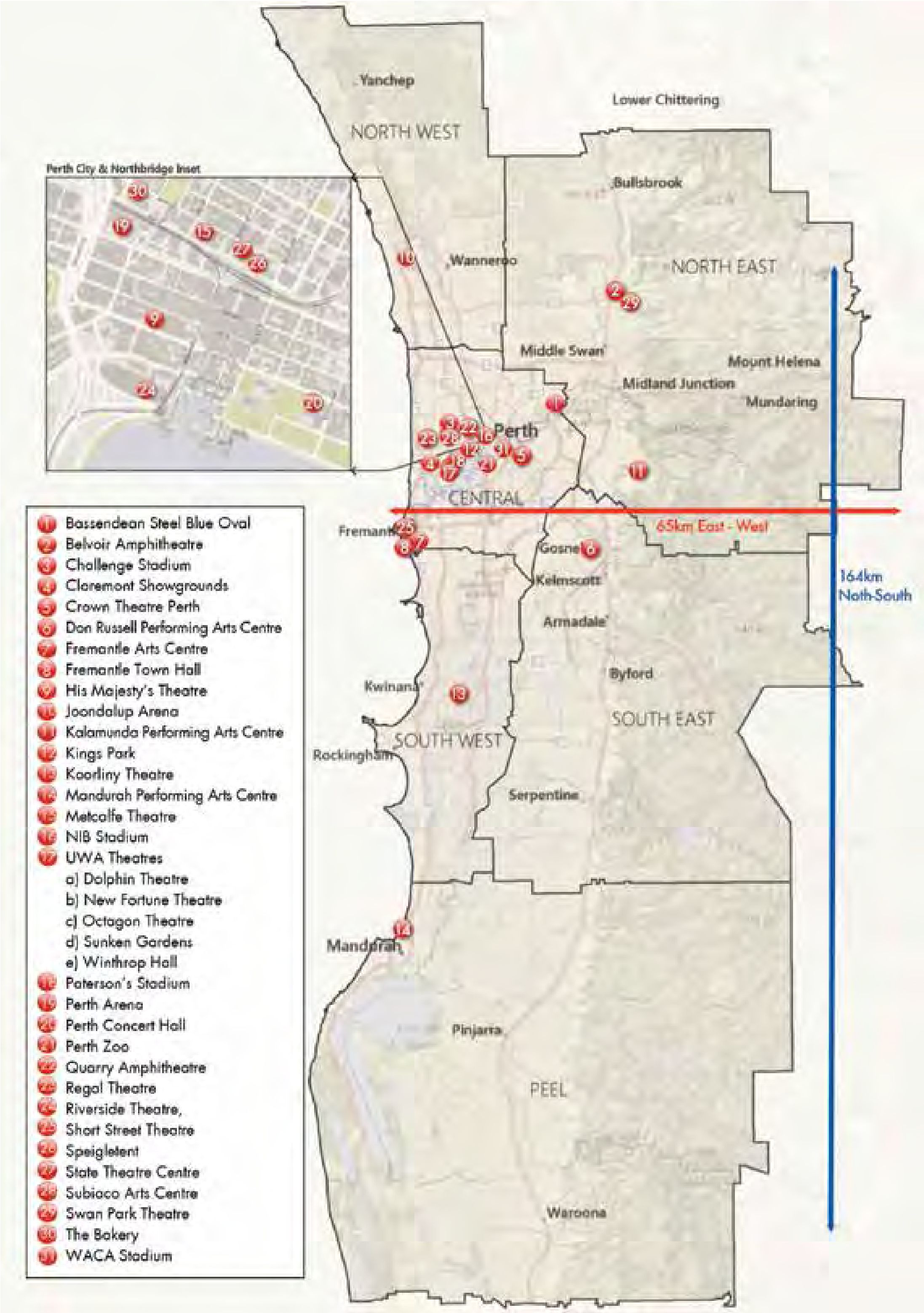
Some venues were investigated and excluded on the basis that they did not meet all of the requirements of the audit as outlined above. These include:

- PICA, Northbridge
- Blue Room, Northbridge
- Harbour Theatre, Fremantle
- Somerville Auditorium, UWA, Crawley

4.2 Summary of Audited Venues by Primary Use and Capacity

A number of the venues were used for a variety of purposes such as theatre and concerts and did not have a primary purpose. Where this is the case, more than one primary use has been identified.

			Primary Use									
Map No.	Venue	Seating Capacity	Theatre	Concerts	Community Based Performances	Dance	Musicals	Opera	Broad range of performing arts	Conferences	Calisthenics	Sport
1	Bassendean Steel Blue Oval	2,500		X								X
2	Belvoir Amphitheatre	4,500		X								
3	Challenge Stadium	5,031		X								X
4	Claremont Showgrounds	55,000		X	X				X			
5	Crown Theatre Perth	2,311							X			
6	Don Russell Performing Arts Centre	210	X									
7	Fremantle Arts Centre	3100							X			
8	Fremantle Town Hall	294		X								
9	His Majesty's Theatre	1,240	X			X	X	X	X			
10	Joondalup Arena	25,000		X								X
11	Kalamunda Performing Arts Centre	257		X								
12	Kings Park	6000	X	X	X		X		X	X		
13	Koorliny Theatre	244			X							
14	Mandurah Performing Arts Centre	800							X			
15	Metcalfe Theatre at the Empyrean	280	X									
16a	NIB Stadium	35,000		X								X
16b	Dolphin Theatre	198							X			
16c	New Fortune Theatre	250		X								
16d	Octagon Theatre	758							X			
16e	Sunken Gardens	385							X			
17	Winthrop Hall	974							X			
18	Paterson's Stadium	43.405		X								X
19	Perth Arena	15,500		X								
20	Perth Concert Hall	1,731		X								
21	Perth Zoo	4,500			X					X		
22	Quarry Amphitheatre Reabold Hill	556		X								
23	Regal Theatre	1,086	X									
24	Riverside Theatre,	2,500		X						X		
25	Short Street Theatre	215	X									
26	Speigletent	320	X									
27	State Theatre Centre	809	X									
28	Subiaco Arts Centre	305	X									
29	Swan Park Theatre	594			X						X	
30	The Bakery	650		X								
31	WACA Stadium	24,500		X						X		X


Perth City & Northbridge Inset
Yanchep
Lower Chittering
NORTH WEST
Bullsbrook
Wanneroo
NORTH EAST
Middle Swan
Mount Helena
Midland Junction
Mundaring
Perth
CENTRAL
65km East - West
Fremantle
Gosnells
Kelmscott
164km
Noth-South
Armadale
Byford
Kwinana
SOUTH EAST
SOUTH WEST
Rockingham
Serpentine
Mandurah
Pinjarra
PEEL
Waroona
1 Bassendean Steel Blue Oval
2 Belvoir Amphitheatre
3 Challenge Stadium
4 Claremont Showgrounds
5 Crown Theatre Perth
6 Don Russell Performing Arts Centre
7 Fremantle Arts Centre
8 Fremantle Town Hall
9 His Majesty's Theatre
10 Joondalup Arena
11 Kalamunda Performing Arts Centre
12 Kings Park
13 Koorliny Theatre
14 Mandurah Performing Arts Centre
15 Metcalfe Theatre
16 NIB Stadium
17 UWA Theatres
a) Dolphin Theatre
b) New Fortune Theatre
c) Octagon Theatre
d) Sunken Gardens
e) Winthrop Hall
18 Paterson's Stadium
19 Perth Arena
20 Perth Concert Hall
21 Perth Zoo
22 Quarry Amphitheatre
23 Regal Theatre
24 Riverside Theatre,
25 Short Street Theatre
26 Speigletent
27 State Theatre Centre
28 Subiaco Arts Centre
29 Swan Park Theatre
30 The Bakery
31 WACA Stadium

4.3 Summary of Audited Venues by *Directions 2031* Regions

The following table provides a breakdown of venues into the *Directions 2031* planning regions.

Map No.	Venue	Address	
North East Region			
2	Belvoir Amphitheatre	1177 Great Northern Highway, Upper Swan	NE
11	Kalamunda Performing Arts Centre	48 Canning Road, Kalamunda	NE
North West Region			
10	Joondalup Arena	Kennedya Drive, Joondalup	NW
Central Region			
1	Bassendean Steel Blue Oval	Cnr of Guildford Road and West Road, Bassendean	C
3	Challenge Stadium	Stephenson Avenue, Mount Claremont	C
4	Claremont Showgrounds	Equestrian Centre, Graylands Road, Claremont	C
5	Crown Theatre Perth	Great Eastern Highway, Burswood	C
7	Fremantle Arts Centre	1 Finnerty Street, Fremantle	C
8	Fremantle Town Hall	8 William Street, Fremantle	C
9	His Majesty's Theatre	825 Hay Street, Perth	C
12	Kings Park	Fraser Avenue, Kings Park	C
15	Metcalfe Theatre at the Empyrean	12 Lake Street, Northbridge	C
16	NIB Stadium	310 Pier Street, Perth	C
17a	Dolphin Theatre	UWA, 35 Stirling Highway, Crawley	C
17b	New Fortune Theatre	UWA, 35 Stirling Highway, Crawley	C
17c	Octagon Theatre	UWA, 35 Stirling Highway, Crawley	C
17d	Sunken Gardens	UWA, 35 Stirling Highway, Crawley	C
17e	Winthrop Hall	UWA, 35 Stirling Highway, Crawley	C
19	Paterson's Stadium	Subiaco Road, Subiaco	C
19	Perth Arena	700 Wellington Street, Perth	C
20	Perth Concert Hall	5 St Georges Terrace, Perth	C
21	Perth Zoo	20 Labouchere Road, South Perth	C
22	Quarry Amphitheatre Reabold Hill	Oceanic Drive, City Beach	C
23	Regal Theatre	474 Hay Street, Subiaco	C
24	Riverside Theatre	PCEC, 21 Mounts Bay Road, Perth	C
25	Short Street Theatre	1 Short Street, Fremantle	C
26	Speigletent	Perth Cultural Centre (mobile venue)	C
27	State Theatre Centre	174-176 William Street, Perth (cnr Roe St)	C
28	Subiaco Arts Centre	180 Hamersley Road, Subiaco	C
29	Swan Park Theatre	Gray Drive, Midvale	C
30	The Bakery	233 James Street, Northbridge	C
31	WACA Stadium	WACA grounds, Nelson Crescent, East Perth	C
South West Region			
13	Koorliny Theatre	20 Sulphur Road, Kwinana	SW
South East Region			
6	Don Russell Performing Arts Centre	Murdoch Road, Thornlie	SE
Peel Region			
14	Mandurah Performing Arts Centre	Ormsby Terrace, Mandurah	P

4.4 Stakeholder feedback

During the process of conducting the audit and preparing this report, informal feedback was received from a number of stakeholders which suggested that:

- there is a need for more theatres with a capacity of 800 to 1,000;
- there is a shortage of affordable, appropriately sized rehearsal space in the region;
- some performing arts companies have a need for appropriate administration space;
- Perth is in need of a dedicated recital hall or appropriately sized new music venue; and
- venue maintenance and cost is an ongoing problem that is limiting the financial sustainability of performing arts venues in the region.

4.5 Key Findings

- There are 35 commercial venues in the Perth and Peel region with a seating capacity of 200 or more that are currently used as performing arts venues.
- Of these, 22 are indoor venues and 13 are outdoor venues or stadiums.
- 24 of these venues have a seating capacity of 500 or more.
- 26 are purpose built performing arts venues while 9 are either stadiums that are primarily used for sporting events, or outdoor parks/gardens that have been subsequently developed as performing arts venues.
- The venues are relatively dispersed, with four of the region's major venues located more than 20 kilometres away from the Perth city centre (reflecting the dispersed nature of the region's urban growth).
- Stakeholder feedback suggests that there is a need for more theatres with a seating capacity of between 800 and 1,000 and that there is a shortage of suitable affordable rehearsal and administration space in the region
- Stakeholder feedback suggests that funding for venue maintenance is a significant ongoing issue for performing arts venues in the region.

5.0 Benchmarking Perth's Performing Arts Infrastructure

International research indicates that the amount and quality of cultural infrastructure in a city is an indicator of cultural vibrancy.

The 2012 *'World Cities of Culture'* report[29] shows that world cities of culture like London, Paris and New York are very well supplied with cultural infrastructure, and that this infrastructure not only supports cultural industries but makes a very significant contribution to city economies, by stimulating new jobs and growth and is an important tool in urban regeneration.

For example, New York is home to 420 theatres hosting more than 43,000 performances per year; London supports 214 theatres showing in excess of 32,000 performances; and Paris is home to 353 theatres attracting nearly 27,000 performances per annum.

This section provides a comparison between the number, capacity and types of venues in Perth and seven other Australian and international cities on a direct and per population basis.

Benchmarking data for the comparison cities has been taken from the 2011 *Planning Sydney's Cultural Facilities* report[30] which selected the international cities of Manchester, Hong Kong, Copenhagen and Chicago based on their international standing, regional representation, size and a sense of similar cultural aspiration. Melbourne and Brisbane were also included for a more local comparison.

It is our view that this already existing data is relevant to Perth and provided a useful benchmark from which to analyse the state of Perth's performing arts and cultural infrastructure.

As the Sydney study provides data on performing arts venues with a seating capacity of approximately 500 or more that are located within 20 kilometres of the city centre, only the Perth venues which meet this criteria have been included in this analysis. As a result, out of the 35 venues that we audited, only 21 have been included in the comparison data, with the remaining 14 having been excluded on the grounds of capacity or distance from the CBD. Stadiums have been included in the comparison to ensure that the data is directly comparable with that gathered in the benchmark cities. Those venues that were included are detailed in Table 1 in the seven categories that were used in the original Sydney study.

Table 1 Summary of Perth Venues by Category

Venue Type	Venue Name
Concert Hall	Perth Concert Hall
Contemporary Music	The Bakery*
Lyric Theatre-Major	His Majesty's Theatre
Lyric Theatre- Musicals	
Dance and Drama Theatre	Octagon Theatre Regal Theatre State Theatre Centre
Arena/Large Multipurpose	Crown Theatre Perth Arena Riverside Theatre Bassendean Steel Blue Oval Challenge Stadium Claremont Showgrounds NIB Stadium Paterson's Stadium WACA Stadium Winthrop Hall
Outdoor Spaces	Fremantle Arts Centre Kings Park Perth Zoo Quarry Amphitheatre

* It is noted that there are two dedicated contemporary music venues in Perth however The Astor requested not to be included in this survey. Whilst this venue has therefore not been featured in the audit, it has been included in the comparative data in order to get the most accurate results.

[29] BOP Consulting (2012) *World Cities Culture Report*, Mayor of London, London

[30] Sweet Reason Pty Ltd (2011) *Planning Sydney's Cultural Facilities*, Arts NSW, Sydney www.artsnsw.com.au

5.1 Benchmark Data: Number, Type and Capacity of Venues

The following tables provide a summary of the comparative data collected for Perth and each of the comparison cities.

Table 2 provides a direct comparison of the number and average capacity of venues across seven venue categories – concert hall, contemporary music, lyric theatre (major), lyric theatre (musicals), dance and drama theatres, arena/large multipurpose theatres, and outdoor spaces.

Table 3 compares the number of venues per category on a per capita basis (i.e. number of venues per million people).

Table 2 Number and Average Seating Capacity of Venues 1

Venue Type	Sydney	Melbourne	Brisbane	Manchester	Copenhagen	Chicago	Hong Kong	Perth	Average
Concert Hall	4 venues Average capacity 1,605	6 venues Average capacity 1,677	6 venues Average capacity 1,243	4 venues Average capacity 2,286	5 venues Average capacity 1,225	3 venues Average capacity 1,870	2 venues Average capacity 1,727	1 venue PCH Capacity 1,731	3.9
Contemporary Music	4 venues Average capacity 1,638	7 venues Average capacity 1,989	3 venues Average capacity 5,067	1 venue Capacity 1,300	6 venues Average capacity 783	9 venues Average capacity 1,372	0	2 venues Average Capacity 775	3.875
Lyric Theatre - Major	1 venue Capacity 1,507	1 venue Capacity 2,079	1 venue Capacity 2,000	2 venues Average capacity 1,825	2 venues Average capacity 1,546	3 venues Average capacity 3,697	1 venue Capacity 1,734	1 venue HMT Capacity 1,240	1.5
Lyric Theatre - Musicals	3 venues Average capacity 1,867	4 venues Average capacity 1,610	0	3 venues Average capacity 1,492	2 venues Average capacity 856	5 venues Average capacity 1,822	6 venues Average capacity 1,133	0	2.87
Dance and Drama Theatre	6 venues Average capacity 724	7 venues Average capacity 671	2 venues Average capacity 795	4 venues Average capacity 586	3 venues Average capacity 583	4 venues Average capacity 718	3 venues Average capacity 905	3 venues Average capacity 884	4
Arena/Large Multipurpose	10 venues Average capacity 21,700	7 venues Average capacity 33,086	8 venues Average capacity 17,920	3 venues Average capacity 37,500	2 venues Average capacity 22,500	2 venues Average capacity 20,959	5 venues Average capacity 4,980	10 venues Average capacity 20,922	5.87
Outdoor Spaces	5	4	2	0	2	5	4	4 venues Average capacity 3,539	3.25
**TOTAL	33	36	22	17	22	31	21	21	25.375

Source: Sweet Reason Pty Ltd, 2011, Planning Sydney's Cultural Facilities, Arts NSW, Sydney

* Benchmarking data was sourced through desktop research, and data collected was confirmed by arts sector representatives of each city. It was noted by Sweet Reason Pty Ltd that the level of detail gathered for Sydney venues was significantly more extensive than that collected for the comparator cities. Similarly, more detailed information was available for artist run initiatives in Sydney, Melbourne and Brisbane than for comparable international venues.

Table 3 Number of venues per million people

Venue Type	Sydney	Melbourne	Brisbane	Manchester	Copenhagen	Chicago	Hong Kong	Perth	Average
Concert Hall	0.8	1.5	3.3	1.5	2.6	0.3	0.3	0.5	1.35
Contemporary Music	0.9	1.75	1.7	0.4	3.15	0.9	0	1.1	1.2
Lyric Theatre-Major	0.2	0.25	0.55	0.8	1.0	0.3	0.14	0.55	0.47
Lyric Theatre-Musicals	0.7	1	0	1.15	1.0	0.5	0.8	0	0.64
Dance and Drama Theatre	1.3	1.75	1.1	1.5	1.6	0.4	0.4	1.7	1.2
Arena/Large Multipurpose	2.2	1.75	4.4	1.15	1.0	0.2	0.7	5.5	2.1
Outdoor Spaces	1.1	1	1.1	0	1.0	0.5	0.6	2.2	0.94

A number of observations are immediately apparent when comparing Perth to the benchmarked cities:

- The total number of venues in Perth is comparable with other cities, however Perth's venues tend to be smaller.
- Perth is undersupplied with concert halls, with one venue compared to an average of 3.9 across the benchmarked cities, and 0.5 venues per million people compared to an average of 1.35 venues per million.
- Perth has only one lyric theatre with a seating capacity of 1,240, compared to an average of 1.5 in the benchmarked cities with an average seating capacity of 2,055. This is, however, slightly above the per capita average on a per population basis.
- Perth does not have a major lyric theatre dedicated to musicals.
- Perth has just 2.0 dedicated contemporary music venues compared to an average of 3.9 in the benchmarked cities, however this is comparable with the city average on a per capita basis, with Perth having 1.1 venues per million people compared to an overall average of 1.2.
- Perth is relatively well served with dance and drama theatres (with 3 compared to the benchmarked average of 4) and 1.7 venues per million people compared to an average of 1.2.
- Perth compares favourably in regard to supply of arenas/large multipurpose venues, however it is noted that this is partially due to the large number of sports stadiums in the region that are only occasionally used as performing arts venues. This may be due to Perth's climate, which suits outdoor events in summer, but could also reflect a lack of purpose built, large multipurpose venues in the region, particularly prior to the development of the Perth Arena. Despite this Perth's supply of indoor arenas and large multipurpose venues is generally consistent with the average - and has been very significantly boosted by the construction of the Perth Arena.
- Perth is well supplied with outdoor performance spaces.

A further comparison of performing arts infrastructure within each of the cities is provided by comparing the total number of seats and venues in the benchmarked cities on a per population basis.

Table 4 compares the total number and seating capacity of venues in Perth with those in the benchmark cities.

Table 4: Number of seats and venues surveyed for each city *(including outdoor venues and stadiums)*

City	Population*	Total Seats	Seats Per 1,000 People	Total Venues	Venues Per 1,000,000 Population
Chicago	9,700,000	136,448	14	31	3.2
Copenhagen	1,894,521	62,380	32.9	22	11.5
Hong Kong	7,100,000	39,601	5.6	21	2.9
Manchester	2,600,100	132,110	50.8	17	6.5
Melbourne	4,000,000	290,317	72.6	36	9
Brisbane	1,800,000	181,104	100.6	22	12
Sydney	4,500,000	272,021	60.5	33	7.3
Perth	1,800,000	230,551	128.1	21	11.7
Average	N/A	167,954	58.13	25.38	8

Source: Sweet Reason Pty Ltd, 2011, Planning Sydney's Cultural Facilities.

* It is noted that Planning Sydney's Cultural Facilities was prepared in 2011. As a result the population statistics included are outdated but have not been altered due to the need to ensure the data provides an accurate representation of facilities/population at the time of collection.

It should also be noted however that the figures for Perth are correct as of end of 2012 in order to capture the more recently opened West Australian State Theatre and Perth Arena in the data.

Table 5 provides a comparison between the total number and seating capacity of venues in the benchmark cities *excluding* outdoor venues and stadiums. These venues have been excluded due to the comparatively large number of these venue types in Perth and their limited availability for performing arts as well as limitations in data availability for some international venues. Please note that indoor stadiums have not been excluded.

Table 5: Number of seats and venues surveyed for each city
(excluding outdoor venues and outdoor stadiums)

City	Population	Total Seats	Seats Per 1,000 People	Total Venues	Venues Per 1,000,000 Population
Chicago	9,700,000	49,330	5.0	25	2.5
Copenhagen	1,894,521	27,380	14.5	19	9.5
Hong Kong	7,100,000	39,601	5.6	17	1.7
Manchester	2,600,100	42,110	16.2	16	5.4
Melbourne	4,000,000	66,717	16.7	29	6.3
Brisbane	1,800,000	39,046	21.7	16	6.7
Sydney	4,500,000	70,521	15.7	25	4.2
Perth	1,800,000	33,490	18.6	12	6.6
Average	N/A	46,024	14.25	19.9	5.36

Source: Sweet Reason Pty Ltd, 2011, Planning Sydney's Cultural Facilities.

* It is noted that Planning Sydney's Cultural Facilities was prepared in 2011. As a result the population statistics included are outdated but have not been altered due to the need to ensure the data provides an accurate representation of facilities/population at the time of collection.
It should also be noted however that the figures for Perth are correct as of end of 2012 in order to capture the more recently opened West Australian State Theatre and Perth Arena in the data.

These comparisons indicate that:

- Perth has fewer venues overall than the average (21 as opposed to an average of 25) but is well served on a seating per capita and venue per capita basis.
- Including outdoor stadiums and venues Perth has the largest number of seats available per capita of any of the benchmarked cities although it is noted that a significant proportion of these seats are within stadiums which are primarily for sporting use.
- Excluding outdoor venues and stadiums the number of seats available per capita in Perth is well above the overall average but is below Copenhagen and Brisbane.
- Perth also has a higher number of venues per capita than the average, although the region has fewer venues per million people than Copenhagen and Brisbane.
- There is a general trend for medium sized cities to have a larger number of venues and seats per capita than major cities.
- It is noted that the quality of venues has not been considered in this analysis and it is likely that some venues are less attractive and functional for users than others; and that some of the cities included in this analysis may have higher quality venues than others.

5.2 Observed Trends in Performing Arts Infrastructure

The report *Planning for Sydney's Cultural Facilities* makes some additional, general observations arising from the examination of the performing arts life in the benchmark cities. A summary of these observations is outlined below:

- Melbourne, Manchester and Chicago have all undertaken careful renovations of old venues in the last few decades as well as building new ones. Cities that have invested in their performance venue infrastructure have developed reputations for being lively, culturally vibrant cities with a wide range of performance experiences on offer.
- In some cases, investment in existing and new infrastructure has led to a resurgence of a theatre district and helped to enliven the surrounding city centre.
- The most successful and active venues are often those with the most striking architectural features – whether in the meticulous restoration of former glory or in the creation of bold, striking new buildings.
- Cities with a good supply of venues tend to have a more active cultural life at many levels throughout the community.
- A clear and strong thread emerged – that cultural facilities are more successful when they are aggregated and integrated within a particular precinct.
- It was observed in the cases of Melbourne and Chicago (and, incidentally from common experience in other cities including London and New York) that a critical mass of venues within one precinct can provide a vibrancy which is more than the sum of its parts. Once these precincts are established (or revived), they tend to become a significant tourist attraction and are promoted as a key feature of the character of a city.
- Cultural development provides an opportunity to revitalise previously 'dead' urban space. Salford Quays in Manchester, Millennium Park in Chicago, and the planned Federation Square East development in Melbourne are all cited as examples of the regeneration of urban/industrial voids into active, central cultural environments.

5.3 Key Findings

- Perth generally compares favourably with other cities on a number of venues and seating per capita basis indicating that Perth has an active and vibrant performing arts sector.
- Perth is very well served in some infrastructure categories (particularly large outdoor venues) but relatively poorly served in others.
- Perth has no major lyric theatre that caters specifically for musicals.
- Perth has an undersupply of concert halls with 0.5 venues per million people compared to an average of 1.35 venues per million across the benchmarked cities.
- Perth has a slight undersupply of contemporary music venues.
- Perth appears to be relatively well served with dance and drama theatres, although stakeholder feedback indicates that theatre venues are hard to find, and there is a need for more (affordable) theatres with between 800 to 1,000 seat capacities. This suggests that there is either a disconnect between perception as opposed to actual supply, or between the number of venues and the quality of venues (i.e. the number of venues that are attractive to local performers).
- Perth compares favourably in regard to the number of arenas/large multi-purpose venues in the region, the capacity of which has been substantially boosted by the opening of the Perth Arena.
- Perth has a comparatively high proportion of stadiums that are primarily for sporting use but are also occasionally used for performing arts events. This may reflect the popularity of outdoor events in the region, but could also be a reflection on the lack of large purpose built venues in the region, particularly prior to the construction of the Perth Arena.
- Performing arts infrastructure in the region is primarily concentrated in inner and middle suburbs, with the only distinct cluster being in Northbridge.
- International research indicates that concentrating new performing arts infrastructure within a cultural precinct or theatre district has been shown to both contribute to the success of venues and to generate vibrancy within the precinct that is 'more than the sum of its parts'.
- A number of cities have invested in renovations of old venues in the last few decades as well as building new ones. The report *Planning Sydney's Cultural Facilities* found that cities that have invested in their performance venue infrastructure have developed reputations for being lively, culturally vibrant cities with a wide range of performance experiences on offer.

The Committee for Perth supports the growth of accessible cultural and arts activities in the Perth region.

6.0 Conclusions and Recommendations

6.1 Conclusions

Perth's arts and cultural sector is thriving. Attendance at performing arts events is increasing and there is significant evidence that Perth's people not only have a growing appetite for arts and culture but that there remains untapped potential for audience growth.

This trend towards increased demand for arts and cultural events, as well as projected rapid population and economic growth could direct Perth towards attendance growth up to or even in excess of 34% by 2021, meaning that Perth's existing cultural infrastructure, some of which is already struggling to meet demand, will come under enormous pressure over the next decade.

In just 40 to 50 years Perth will need adequate performing arts infrastructure to meet the demand of an estimated population of four million people, meaning that Perth will need infrastructure that is of comparable size and quality to that in metropolitan Melbourne today. This means that the number of performing arts venues in Perth will need to approximately double.

Tourism Western Australia also has a target of doubling the value of tourism in Western Australia by 2020. To achieve this, Tourism Western Australia has identified seven strategic goals, including positioning WA as a recognised events destination for locals and visitors and providing every visitor the opportunity to have an Indigenous cultural experience – both goals that are likely to increase demand for cultural facilities.

It is evident that our existing performing arts infrastructure is not adequate to meet this growth in demand.

While Perth generally compares favourably with other cities in regards to the number of venues and seating per capita basis, the region also has some very clear infrastructure gaps.

In particular Perth has an undersupply of lyric theatres and concert halls, and the region's supply of contemporary music venues is slightly lower than the average across the comparison cities.

In addition, while Perth appears to be adequately supplied with dance and drama theatres, stakeholder feedback indicates that theatre venues are hard to find, and there is a need for more (affordable) theatres with between 800 to 1,000 seat capacities. This suggests that there is either a disconnect between perception as opposed to actual supply, or between the number of venues and the quality of venues (i.e. the number of venues that are attractive to local performers). This issue may require further investigation.

Stakeholder feedback also suggests that Perth is lacking rehearsal spaces that are affordable and of an appropriate size; that there is a need for permanent administration and rehearsal spaces for some companies; and that the cost of venue maintenance is an ongoing issue for the sector.

There is an opportunity to develop an Indigenous cultural centre which includes performing arts space in Perth.

International research suggests that when developing new cultural infrastructure, a critical mass of venues within one precinct both assists in increasing the success of the venue itself and can also provide a vibrancy which is more than the sum of its parts. Once these precincts are established (or revived), they tend to become significant tourist attractions and are promoted as a key feature of the character of a city.

Finally, this audit indicates that investment in some types of performing arts infrastructure is needed to meet current demand in Perth and to enable performing arts attendance rates to continue to grow.

It is also evident that very substantial medium and long term investment in performing arts infrastructure will be required to meet the demand generated by population growth – investment that should aim to position Perth as a global leader in the arts.

6.2 Recommendations for State Government

On the basis of these findings, it is recommended that:

1. The State Government prepares a long term Plan for Arts and Cultural Infrastructure that positions Perth as a global leader in arts and culture.
2. The Infrastructure Plan should be completed within 12 months and funding decisions flowing from the Plan commence in the 2014-15 Budget
3. Priority infrastructure requirements to be addressed in the Plan include:
   - the development of an Indigenous cultural centre in Perth that includes performing arts space in order to meet the demand for Indigenous cultural events both within the Indigenous communities and the tourism sector.
   - the development of a new major lyric theatre in Perth that is suitable for large scale opera, ballet and musical theatre.
   - whether there is a need for an additional concert hall or recital hall.
4. The plan should develop locational criteria for major infrastructure to ensure that it makes a positive contribution to the urban landscape and capitalises on the potential for city activation and economic benefits.

6.3 Considerations for the arts and cultural sector

The scope of works of this report has been to analyse the commercial performing arts infrastructure that is presently in use in the Perth and Peel region with an audience capacity of over 200, offering ticketed events and available for public hire.

This report has been fully funded by the Committee for Perth through the membership contributions of Perth's business, civic and local government communities. It is a non-sectoral, quantitative audit of the infrastructure and, as such, the report does not offer either commentary or analysis on how the venues are used; how often they are used and how often they are available; hire costs and restrictions; programs or budgeting for maintenance or upgrade; or the current condition and quality.

For example, despite the report findings positioning Perth's current infrastructure offerings in a positive light, an audit alone does not take into account the needs of specific performing arts companies, including the need for one of Perth's major arts bodies the WASO, to have a suitable permanent administration and rehearsal spaces.

Following a review of the draft report by the Committee for Perth's Revitalising working group and representatives of the Chamber of Arts and Culture, it is felt that the report gives rise to other considerations that require further examination. These include:

- Should additional work be undertaken to examine in detail the demand for dance and drama theatres in Perth to identify whether there remains a shortage of supply; whether there is a shortage of high quality theatres; and whether there is a need for additional rehearsal space in the region?
- Should additional work be undertaken to examine cultural infrastructure funding in Perth in comparison to other cities and identify potential funding opportunities to ensure that existing, new and renewed cultural infrastructure remains financially viable through its projected life cycle?
- Is the current situation in regards to suitability, availability and affordability of performance and rehearsal venues acceptable?
- Are adequate considerations for costs of and funding for the ongoing maintenance and improvement of existing venues in place?
- Would a further study into global audience and live performance trends and demographics provide useful information as to the nature of the performing arts venues that are likely to be in demand in the future?
- Should consideration be given to the development of a proposal to incentivise developers to provide a lyric theatre / rehearsal space and arts administration facility as part of a precinct / arts hub in the Elizabeth Quay waterfront project area?

Appendices

Appendix A: Full List of References

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Appendix B:
Venue Summaries, Performing Arts Perth

Bassendean Steel Blue Oval

Typical seating and stage layout floorplan

Source: www.waflgoldenera.blogspot.com

Bassendean Steel Blue Oval

Street Address	Cnr of Guildford Road and West Road, Bassendean
Suburb	Bassendean
Best contact person for venue audit	Tim Clark – tclark@bassendean.wa.gov.au Ross Rayson – rrayson@bassendean.wa.gov.au
Map Ref	1
Directions 2031 Region	Central
Local Government Authority	Town of Bassendean
Phone number	(08) 9377 8000
Email	mail@bassendean.wa.gov.au
Venue website	http://www.bassendean.wa.gov.au
Operator and management arrangements	Hiring of venue through the Town of Bassendean
Funding sources	
Primary purpose	Sport: WAFL
Secondary purpose	Hiring venue for concerts, sporting and other purposes
Stage configuration options	Feasible for variety of uses
Seating capacity (including seating capacity in all configurations)	40,000 patrons standing for concert 1,500 seats on stands.
Facilities included	• Stands, pavilions, large grass bank, and lounges for members • Broadcast facilities • Changerooms
Year constructed	
Significant renovations - year of works and details	
Additional amenities in the facility e.g. Bars, dining venues, exhibition space, meeting rooms	• Corporate lounges • Train Station close by (within walking distance)

Source: www.newsite.eventpersonnelaustralia.com.au

www.inmycommunity.com.au

Belvoir Amphitheatre, Upper Swan

Typical seating and stage layout floorplan

Source: www.nearmap.com

Belvoir Amphitheatre, Upper Swan

Street Address	1177 Great Northern Hwy
Suburb	Upper Swan
Best contact person for venue audit	Tanya - Events Co-ordinator
Map Ref	2
Directions 2031 Region	North-East
Local Government Authority	City of Swan
Phone number	9296 3033
Email	admin@Belvoir.net.au
Venue website	http://www.belvoir.net.au/
Operator and management arrangements	Ticketing through Ticketmaster
Funding sources	
Primary purpose	Hiring venue for concerts
Secondary purpose	
Stage configuration options	
Seating capacity (including seating capacity in all configurations)	Amphitheatre seats maximum 4,500 patrons
Facilities included	
Year constructed	
Significant renovations - year of works and details	
Additional amenities in the facility e.g. Bars, dining venues, exhibition space, meeting rooms	

Source: www.my247.mobi/perth

Challenge Stadium, Mount Claremont

Typical seating and stage layout floorplan

Source: www.ticketmaster.com.au

Google Maps images

Challenge Stadium, Mount Claremont

Street Address	Stephenson Avenue,
Suburb	Mount Claremont
Best contact person for venue audit	Hellen Hill, Venues West
Map Ref	3
Directions 2031 Region	Central
Local Government Authority	Town of Cambridge
Phone number	(08) 9441 8222
Email	contactus.challenge@venueswest.wa.gov.au
Venue website	http://www.venueswest.wa.gov.au/
Operator and management arrangements	Venues West
Ticketing through Ticketmaster	
Funding sources	State government and self funding
Primary purpose	Multi purpose sport and aquatic centre
Secondary purpose	Recreation, entertainment, functions and banquest, music and concerts
Stage configuration options	Feasible for variety of uses: Sport and Stage with floor standing
Seating capacity (including seating capacity in all configurations)	Full Concert: 5031(Standing room on the floor)
Reserved Seated: 4259 (Seated Floor)	
Basketball total Capacity 4,424	
Facilities included	Gym, Swimming pool
Year constructed	1986
Significant renovations - year of works and details	2013/14 – additional of new WAIS facility to SE corner of Challenge Stadium building
Additional amenities in the facility e.g. Bars, dining venues, exhibition space, meeting rooms	Shop, cafe and creche facilities

Source: www.gtaust.com www.roxettecafe.com

Claremont Showgrounds, Claremont

Typical seating and stage layout floorplan

Source: Supplied by Claremont Showgrounds and permission to use images from www.claremontshowground.com.au

Source: www.soundwave.com

Claremont Showgrounds, Claremont

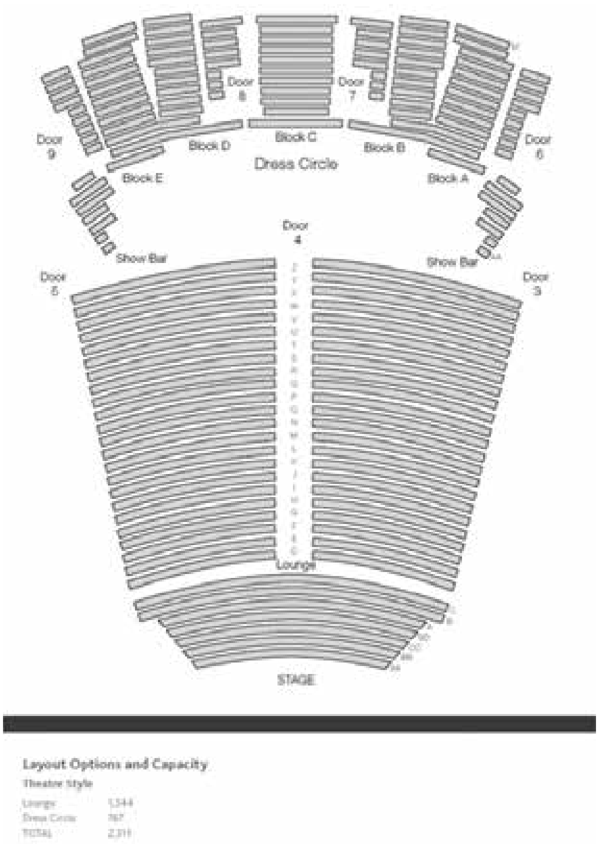
Street Address	Gate 1 Graylands Road, Claremont
Suburb	Claremont
Best contact person for venue audit	Peter Cooper, Chief Operating officer
Map Ref	4
Directions 2031 Region	Central
Local Government Authority	Town of Claremont
Phone number	(08) 6263 3100
Email	venuesales@raswa.org.au
Venue website	http://www.claremontshowground.com.au/venues/outdoor-areas
Operator and management arrangements	Booking through Claremont Showgrounds and Ticketmaster
Funding sources	Self Funded
Primary purpose	Perth Royal Show , performances, fairs, marquee dinner functions, social club fairs, concerts, markets, filming, outdoor events, vehicle shows and shines
Secondary purpose	
Stage configuration options	Feasible for variety of uses
Seating capacity (including seating capacity in all configurations)	45,000 - 55,000 patrons
Facilities included	Exhibition space, Ovals that can be adjusted to be event specific.
Year constructed	1902
Significant renovations - year of works and details	1999 - Tranformation of Speedway into multipurpose arena
Additional amenities in the facility e.g. Bars, dining venues, exhibition space, meeting rooms	• Catering • Train station • Exhibition space • Meeting rooms • Bars

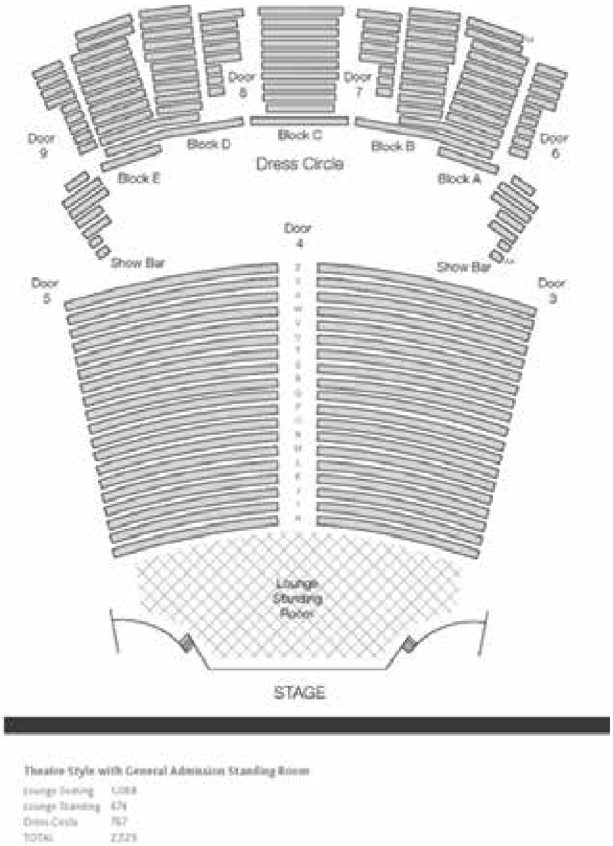
Source: www.novation.com.au

www.ticketsinvetory.com

Crown Theatre Perth, Burswood

Typical seating and stage layout floorplan





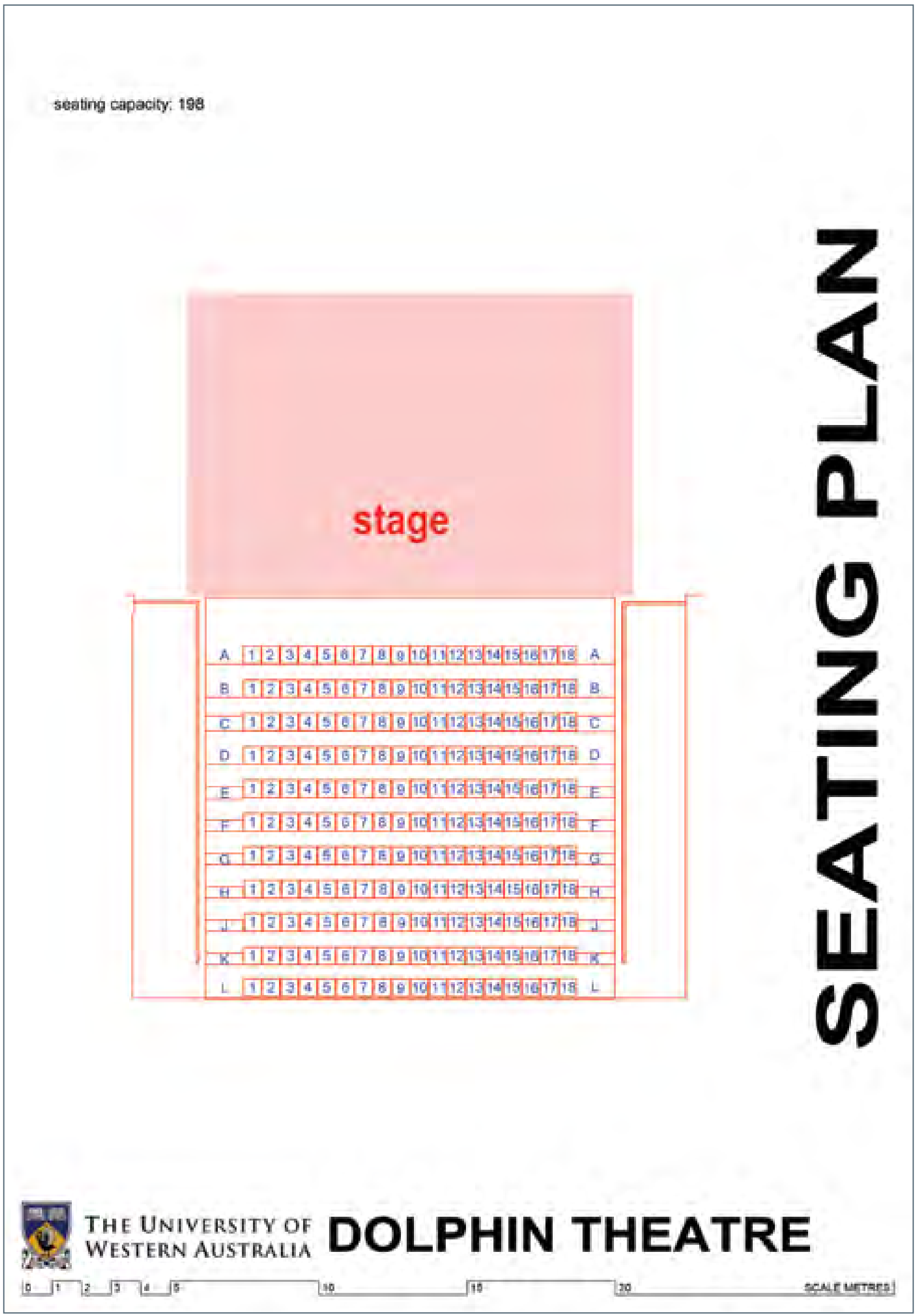
Source: Leander Harder, Entertainment Co-ordinator – Theatre, Crown Perth

Crown Theatre Perth, Burswood

Street Address	Great Eastern Hwy
Suburb	Burswood
Best contact person for venue audit	Leanda Harder - Entertainment coordinator for Crown Theatre
Map Ref	5
Directions 2031 Region	Central
Local Government Authority	Town of Victoria Park
Phone number	9362 7685
Email	Leanda.harder@crownperth.com.au
Venue website	http://www.crownperth.com.au/entertainment/crown-theatre-perth
Operator and management arrangements	Privately owned. Venue managed in-house. Management hires out the facility. Ticketek are the contracted ticketing provider
Funding sources	Exclusively funded by Crown/James Packer.
Primary purpose	Mix of long running musicals, concerts, theatrical performances, dance performances, children's events, school events
Secondary purpose	Conference plenary sessions, product launches
Stage configuration options	Nil – the stage is fixed
Seating capacity (including seating capacity in all configurations)	2,311 patrons
Facilities included	The proscenium opening is 18m x 8.5m. The stage is 14.5m deep from the front lip to the cyc. Dressing rooms; foyers; Green Rooms; laundry; wardrobes; Male and Female Chorus rooms
Year constructed	1985
Significant renovations - year of works and details	In 2000 the theatre had a major rebuild – changed dress circle, new fly lines for stage
Additional amenities in the facility e.g. Bars, dining venues, exhibition space, meeting rooms	3 bars in the foyers; meeting rooms; exhibition space

Dolphin Theatre, UWA, Crawley

Typical seating and stage layout floorplan



Source: University Theatres

Source: University Theatres

Dolphin Theatre, UWA, Crawley

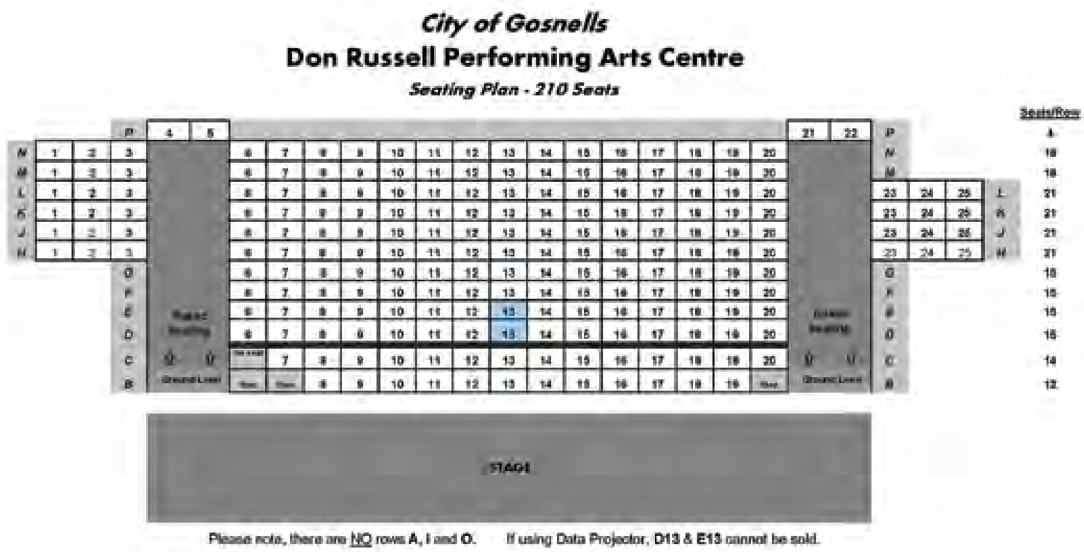
Street Address	The University of Western Australia, 35 Stirling Highway
Suburb	Crawley
Best contact person for venue audit	Bookings Coordinator
Map Ref	17a
Directions 2031 Region	Central
Local Government Authority	City of Subiaco
Phone number	(08) 6488 7407
Email	bookings-theatres@uwa.edu.au
Venue website	http://www.theatres.uwa.edu.au/venues/dolphin
Operator and management arrangements	Run by University Theatres
Funding sources	None
Primary purpose	Performing Arts
Secondary purpose	Education
Stage configuration options	Standard
Seating capacity (including seating capacity in all configurations)	198
Facilities included	Full performance facilities with fly tower (manual hemp)
Year constructed	1976
Significant renovations - year of works and details	Refurbished in 1994
Additional amenities in the facility e.g. Bars, dining venues, exhibition space, meeting rooms	Bar and workshop

Source: Image supplied by Robert Housley - Manager


Source: www.gosnells.wa.gov.au

Don Russell Performing Arts Centre, Gosnells

Typical seating and stage layout floorplan



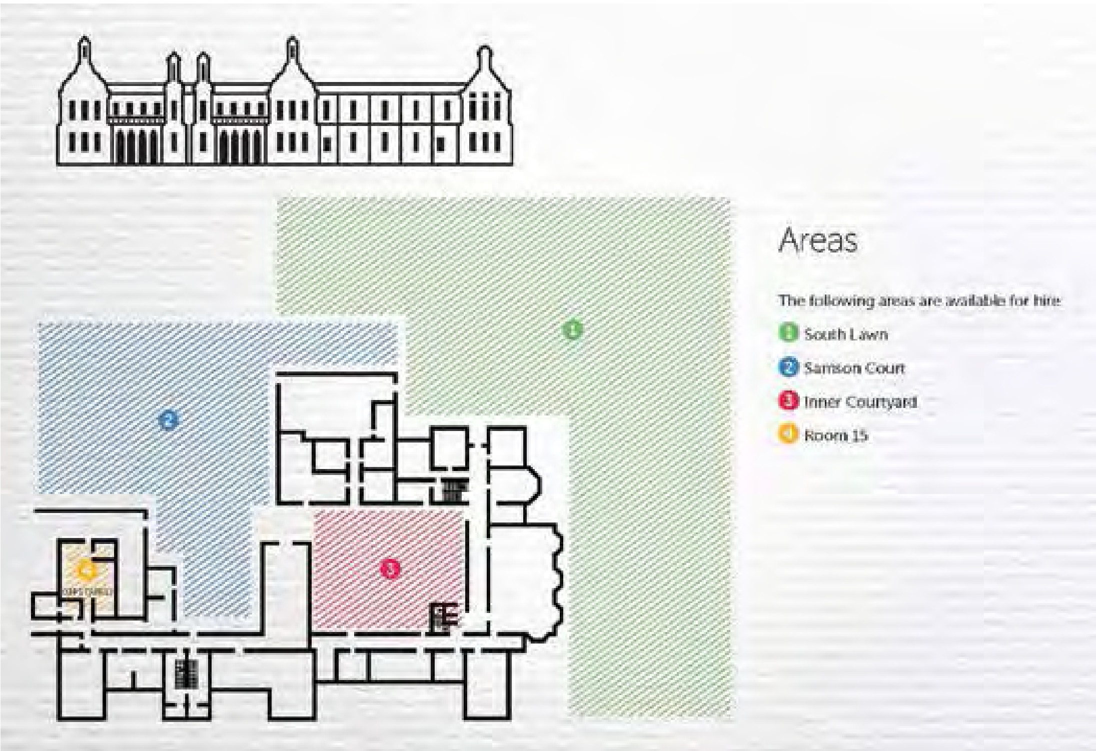
Don Russell Performing Arts Centre, Gosnells

Street Address	Murdoch Rd
Suburb	Thornlie (next to the Forest Lakes Shopping Centre)
Best contact person for venue audit	Robert Housley – Manager
Map Ref	6
Directions 2031 Region	South-East
Local Government Authority	City of Gosnells
Phone number	9493 4577
Email	drpac@gosnells.wa.gov.au
Venue website	http://www.gosnells.wa.gov.au
Operator and management arrangements	Owned and managed by the City of Gosnells, this is a purpose-built performing arts facility
Funding sources	City of Gosnells
Primary purpose	Theatre productions for local performing arts groups, community cultural groups and professional performing arts companies
Secondary purpose	Fully equipped dance studio is hired out to private dance teachers
Stage configuration options	It is a proscenium arch style theatre and stage extensions can be added to make it deeper, giving up to 1/3 more stage floor space
Seating capacity (including seating capacity in all configurations)	Capacity for 210 patrons
Facilities included	Usual sound and lighting technology of a modern theatre but also has an audio loop under the chairs. Has showers and toilets and a combined dressing room
Year constructed	1994
Significant renovations - year of works and details	Using Federal funding, the internal configuration was improved 3 years ago. Minor internal upgrade planned in 2013. Ideally looking at doubling size of foyer to cope with capacity crowds; increase depth of the stage; provide room for cross-over at back of stage; build second facility behind the venue to cater for the dance component
Additional amenities in the facility e.g. Bars, dining venues, exhibition space, meeting rooms	Kitchen is available for hire

Source: Fremantle Arts Centre

Fremantle Arts Centre

Typical seating and stage layout floorplan



463

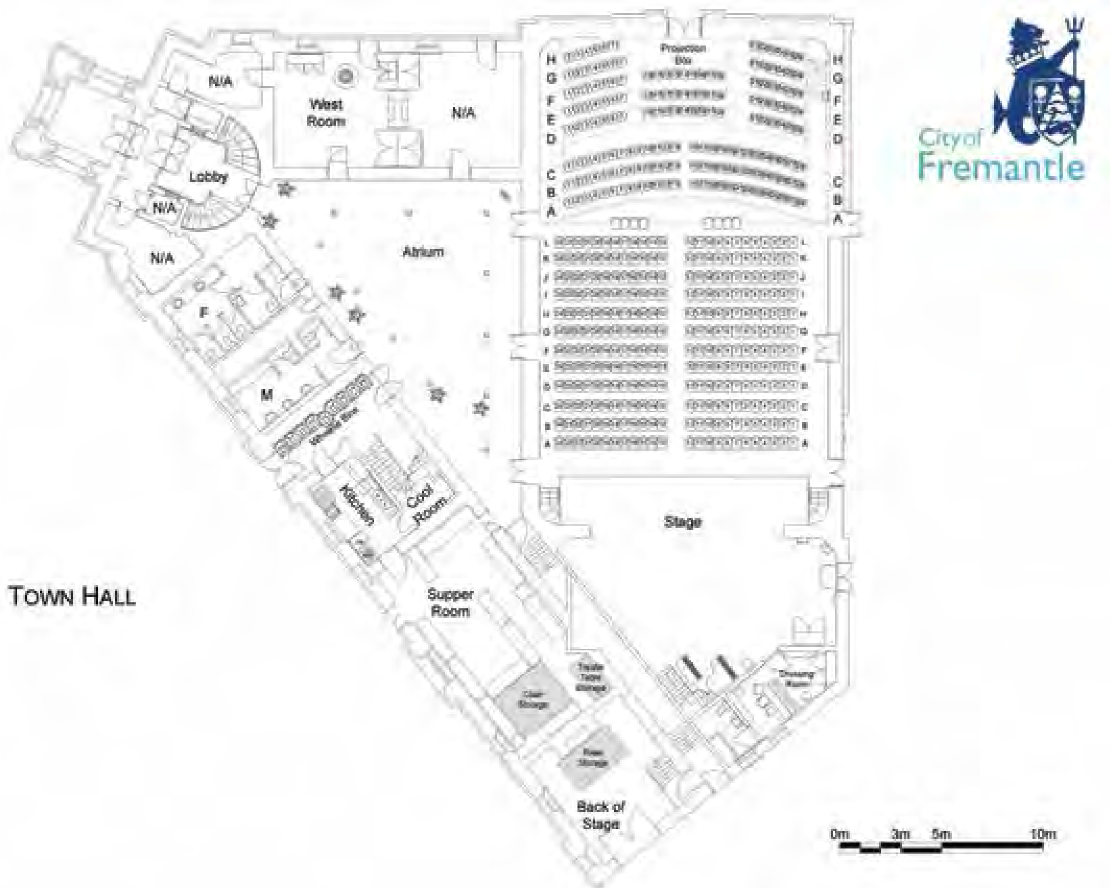
Fremantle Arts Centre

Street Address	1 Finnerty Street
Suburb	Fremantle
Best contact person for venue audit	Pete Stone – General Manager
Map Ref	7
Directions 2031 Region	Central
Local Government Authority	City of Fremantle
Phone number	61 8 9432 9568
Email	petes@fremantle.wa.gov.au
Venue website	www.fac.org.au
Operator and management arrangements	Business Unit of City of Fremantle
Funding sources	City of Fremantle, State Government – multi-year contract, Govt Grants, philanthropic foundations, sponsors, earned income
Primary purpose	Multi-arts organisation
Secondary purpose	
Stage configuration options	See attached document
Seating capacity (including seating capacity in all configurations)	See attached document
Facilities included	
Year constructed	Outdoor heritage venue
Significant renovations - year of works and details	NA
Additional amenities in the facility e.g. Bars, dining venues, exhibition space, meeting rooms	Multi-art venue with galleries, course program/teaching studios, artist studios, shop, café, gardens

Source: Fremantle Arts Centre

Fremantle Town Hall, Fremantle

Typical seating and stage layout floorplan



Source: Supplied by Charlotte Cooper-Dickson

Fremantle Town Hall, Fremantle

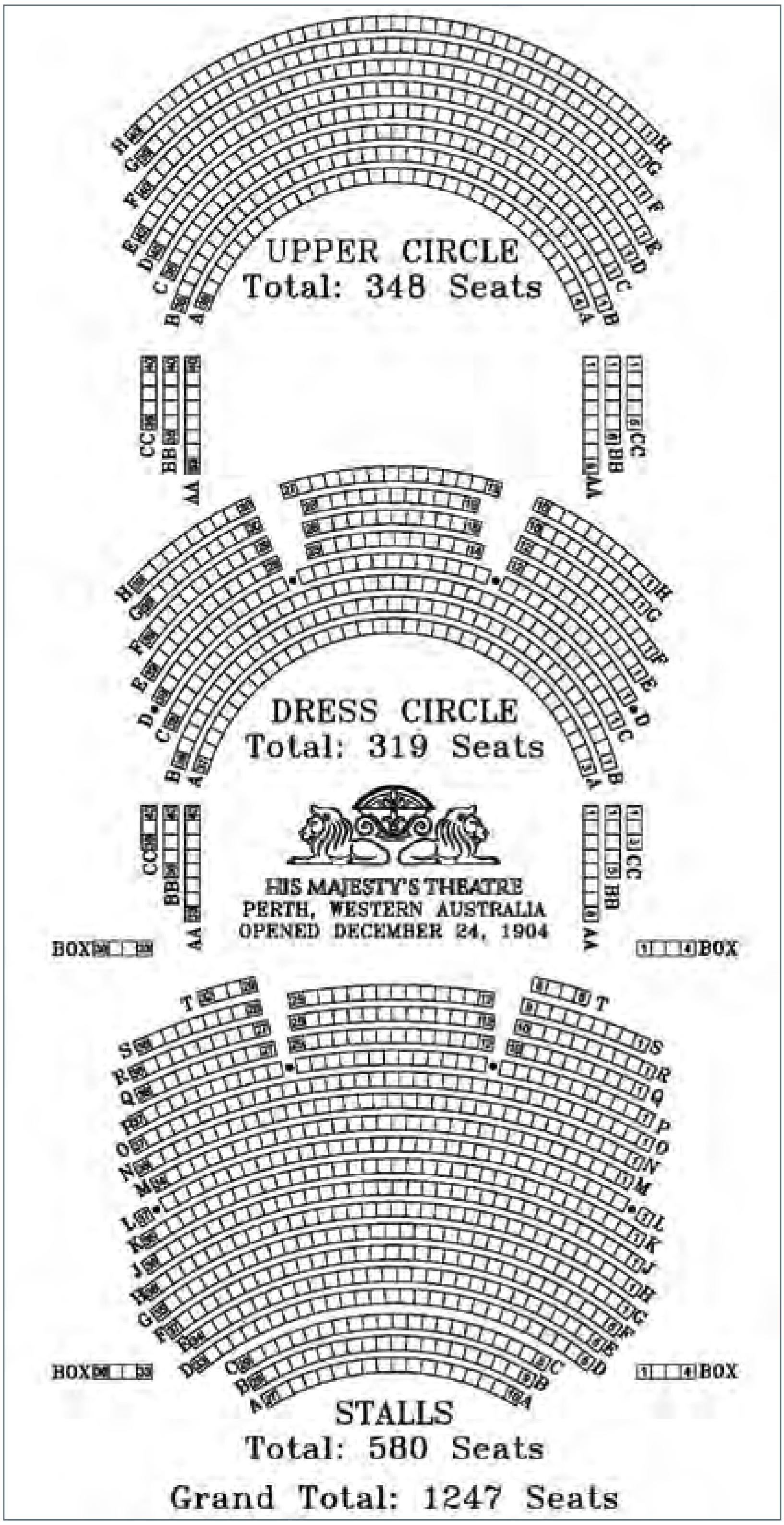
Street Address	8 William Street
Suburb	Fremantle
Best contact person for venue audit	Charlotte Cooper-Dickson - Bookings Officer
Map Ref	8
Directions 2031 Region	Central
Local Government Authority	City of Fremantle
Phone number	9432 9702
Email	bookings@fremantle.wa.gov.au
Venue website	Does not have own website
Operator and management arrangements	City of Fremantle owned. Hires the hall to clients
Funding sources	City of Fremantle
Primary purpose	Hiring of facility to external clients for functions
Secondary purpose	Concerts
Stage configuration options	Stage can be made shallower by drawing across a heavy curtain
Seating capacity (including seating capacity in all configurations)	Main Hall seats 294 patrons; the Balcony seats 169 patrons and the East Room seats 30. Total seating capacity for venue is 493
Facilities included	Kitchen for heating food only. Piano; tables & chairs; very small Green Room
Year constructed	1887
Significant renovations - year of works and details	Refurbishment competed in 1986/7 for the America's Cup. Specific work not identified Ideally would like a commercial kitchen; 2 new green rooms; permanent stage lighting; house sound system; overhaul of stage layout and fixtures and a repaint
Additional amenities in the facility e.g. Bars, dining venues, exhibition space, meeting rooms	Atrium and the West Room

Source: Website and supplied by Charlotte Cooper-Dickson

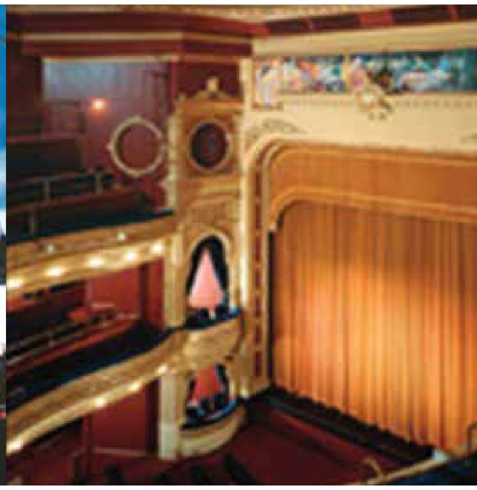


His Majesty's Theatre, Perth

Typical seating and stage layout floorplan



467



Source: Image supplied by Perth Theatre Trust

His Majesty's Theatre, Perth

Street Address	825 Hay St
Suburb	Perth
Best contact person for venue audit	Alan Ferris - General Manager - Perth Theatre Trust Properties
Map Ref	9
Directions 2031 Region	Central
Local Government Authority	City of Perth
Phone number	(08) 9265 0900
Email	
Venue website	http://www.hismajestystheatre.com.au/ or http://www.perththeatretrust.com.au
Operator and management arrangements	His Majesty's Theatre is managed by the external service provider, AEG Ogden (Perth). Ticketing is through Ticketek
Funding sources	State Government appropriation
Primary purpose	Providing accommodation for resident company, the West Australian Opera and houses The Museum of Performing Arts. Provides a wide range of performing arts events by local, national and international companies and is a major venue for the annual Perth International Arts Festival
Secondary purpose	Hiring out space to companies, also offering on-site catering. A Ticketek outlet is located on the ground floor
Stage configuration options	Stage can be extended by using the orchestra pit
Seating capacity (including seating capacity in all configurations)	1,240 patrons
Facilities included	11 Dressing Rooms; Green Room; Sound Proof Conductor's Room; Tune-up and Rehearsal Rooms; Wardrobe - full facilities; Visiting Management Offices with phone and fax lines
Year constructed	1902 - 1904
Significant renovations - year of works and details	1977-80 – amalgamation of Theatre & hotel to form accommodation for resident companies, WA Ballet & WA Opera
Additional amenities in the facility e.g. Bars, dining venues, exhibition space, meeting rooms	Restaurant, cafe and bar

Joondalup Arena

Typical seating and stage layout floorplan

Source: Image extract from Venues West Promoters Guide

Joondalup Arena

Street Address	Kennedya Drive
Suburb	Joondalup
Best contact person for venue audit	Viki Shelver
Map Ref	10
Directions 2031 Region	North West
Local Government Authority	City of Joondalup
Phone number	(08) 93007143
Email	contactus.arena@venueswest.wa.gov.au/ events@venueswest.wa.gov.au
Venue website	http://www.venueswest.wa.gov.au/
Operator and management arrangements	Venues West Ticketing through Ticketmaster
Funding sources	State government and self funding
Primary purpose	Multi purpose sport, recreation and aquatic centre
Secondary purpose	
Stage configuration options	Feasible for variety of uses: Sport and Stage with floor standing
Seating capacity (including seating capacity in all configurations)	25,000 patrons
Facilities included	Gym, Swimming pool, indoor courts, function rooms, outdoor netball courts, AstroTurf hockey field, football oval, rugby oval, tennis courts
Year constructed	1986
Significant renovations - year of works and details	1999/2000 addition of Aquatic Centre (8x50m competition pool and 3x25m plus leisure pool)
Additional amenities in the facility e.g. Bars, dining venues, exhibition space, meeting rooms	Sportsbar, cafe and childcare Function rooms

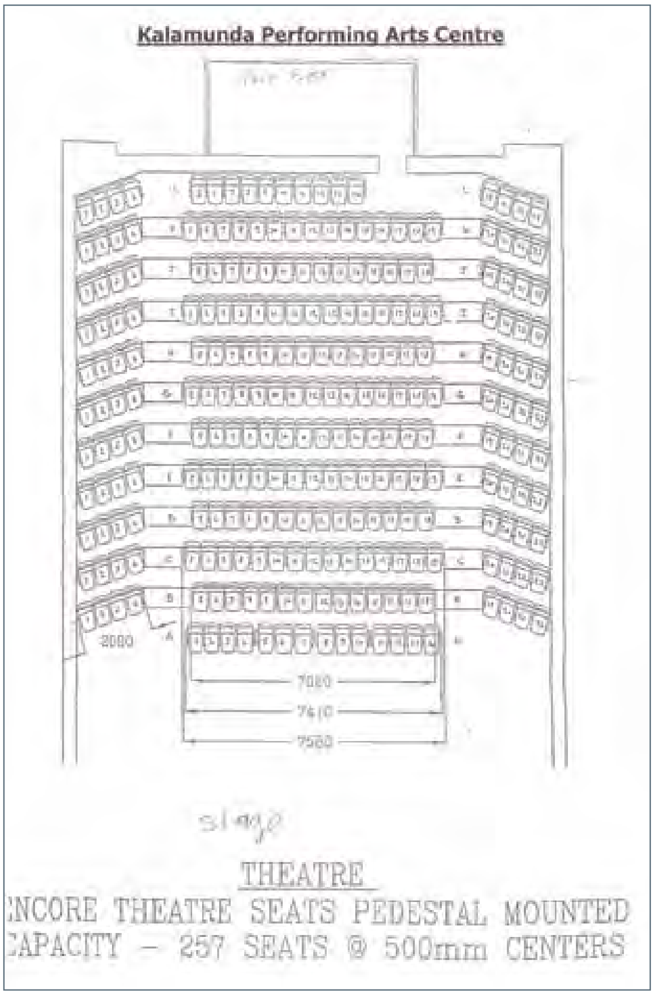
Source: Images supplied by Venues West

Source: www.mingor.net (copyright © of the webmaster)

Source: www.aboutsounds.com.au

Kalamunda Performing Arts Centre, Kalamunda

Typical seating and stage layout floorplan



Source: Hames Sharley

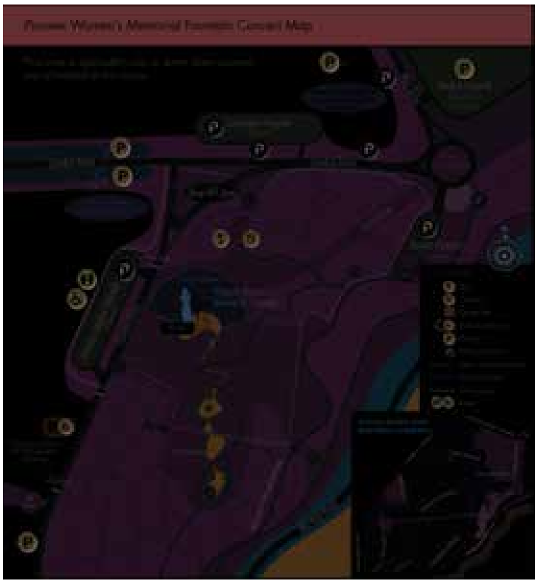
Kalamunda Performing Arts Centre, Kalamunda

Street Address	48 Canning Rd
Suburb	Kalamunda
Best contact person for venue audit	Catherine Daniels - Administrator
Map Ref	11
Directions 2031 Region	North-East
Local Government Authority	Shire of Kalamunda
Phone number	9257 2558 (Tue-Thu: 0900 – 1500 hrs; Fri: 0900 – 1700)
Email	performingarts@kalamunda.wa.gov.au
Venue website	http://www.kalamunda.wa.gov.au/
Operator and management arrangements	Owner/operated is Shire of Kalamunda. Ticketing through Performing Arts Centre or Zig-Zag Cultural Centre
Funding sources	Shire of Kalamunda. Proposal on table to source additional sponsorship
Primary purpose	Primarily hired out to community groups, schools and dance teachers
Secondary purpose	Hoping to arrange events such as concerts in future.
Stage configuration options	Sprung stage can be reconfigured into a catwalk or made smaller by removing the front block
Seating capacity (including seating capacity in all configurations)	Auditorium seats for 257 patrons Agricultural Hall seats 230 Teaching area seats 60 patrons Total capacity is 547
Facilities included	The large foyer has a ticket box, bar area and comfortable seating. A hangtrac system enables this area to also be used for small exhibitions. A smaller teaching area can be used as a Black Box theatre. Kitchen in the Agricultural Hall
Year constructed	1996 – Department of Education helped finance the building so it has shared use – up to 150 free hours. Agricultural Hall is more than 100 years old and is Heritage Listed
Significant renovations - year of works and details	None
Additional amenities in the facility e.g. Bars, dining venues, exhibition space, meeting rooms	None

Kings Park and Botanic Garden

Typical seating and stage layout floorplan

Source: www.bpga.wa.gov.au



Source: www.bpga.wa.gov.au

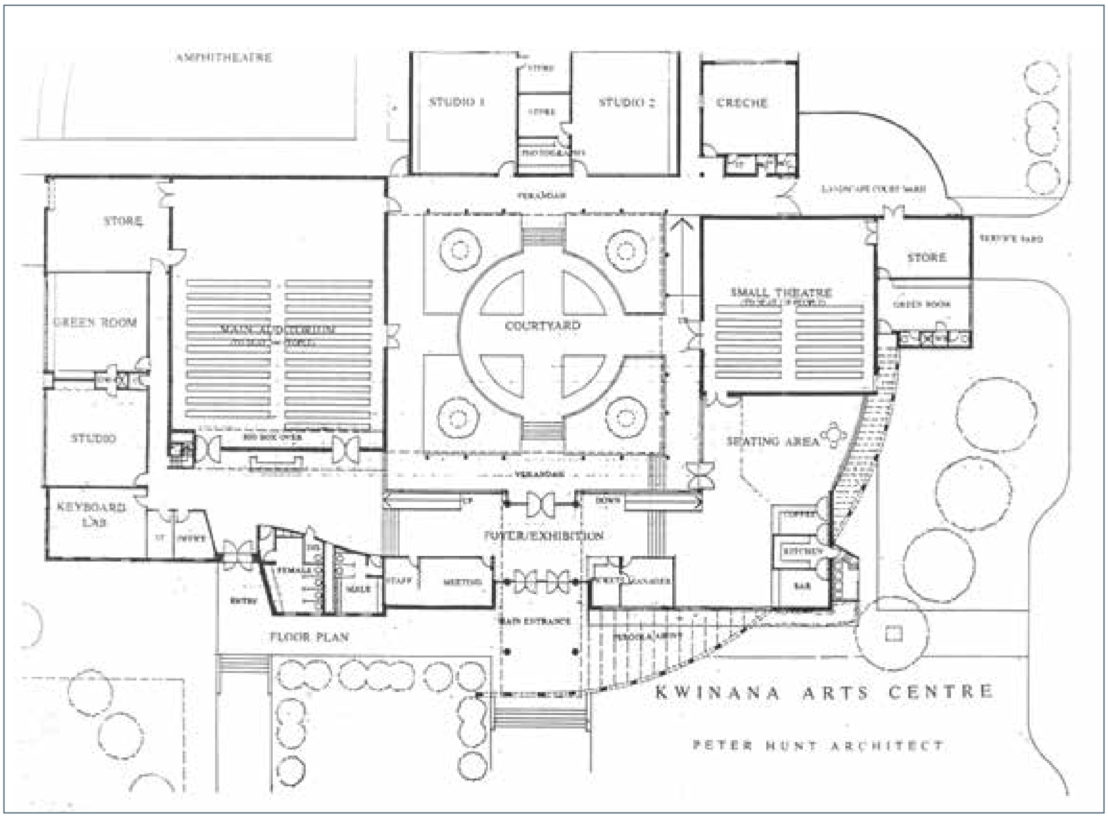
Botanic Garden & Parks Authority

Kings Park and Botanic Garden

Street Address	Fraser Avenue
Suburb	Kings Park, West Perth
Best contact person for venue audit	Events Co-ordinator Zoe Fulwood or Park Management Officer
Map Ref	12
Directions 2031 Region	Central
Local Government Authority	Not applicable (State Government A class reserve land not officially within local council area)
Phone number	(8) 9480 3624/ (8) 9480 3600
Email	enquiries@bgpa.wa.gov.au
Venue website	http://www.bgpa.wa.gov.au/kings-park
Operator and management arrangements	Botanic Gardens and Parks Authority
Funding sources	Approximately two thirds State Government funding for operational costs, and one third of annual budget generated from own source revenue including leases, licences, sales, consultancies, sponsorships and similar.
Primary purpose	Significant conservation, recreational, historical / cultural and tourism purposes as the premier public Park, including the State War Memorial and State Botanic Garden.
Secondary purpose	Family and Community gatherings and celebrations, Services (e.g. ANZAC day and many memorial services), School Programs, Tours and Walks, Outdoor Concerts, Theatre and Cinema.
Stage configuration options	Feasible for variety of uses, no fixed seating
Seating capacity (including seating capacity in all configurations)	6,000 capacity in Botanic Garden precinct for a concert event 2,000 capacity in Synergy Parkland for Outdoor Cinema 800 capacity for Shakespeare in the Park venue 500 capacity for Children's Theatre at Saw Avenue Amphitheatre Floor plans are not available as these are temporary venues for fixed periods each summer only. Seating is Festival style (on grass).
Venues for hire for family social gatherings and special occasions.	Sportsbar, cafe and childcare Function rooms
Facilities included	Education programs, Events, Public Toilets, Pathways, Playgrounds, Parklands, Shelters, Bushlands, Memorials, Cafes / Restaurants, general visitor amenities
Year constructed	The whole of Kings Park was set aside as a park for public purposes in 1831 and gazetted and protected as a park in 1872. The 17 hectare Botanic Garden was established 1965.
Significant renovations - year of works and details	Ongoing renovations throughout the history of the Park, with most recent 20 years being a period of rapid refurbishment and development of amenities to support growing visitation and reputation of the Park.
Additional amenities in the facility e.g. Bars, dining venues, exhibition space, meeting rooms	Limited seminar facilities in some buildings Dining facilities in 3 cafes, a kiosk and a restaurant. High end gallery and gift shop in Aspects of Kings Park with WA and Australian designed products.

Koorliny Theatre, Kwinana

Typical seating and stage layout floorplan



475

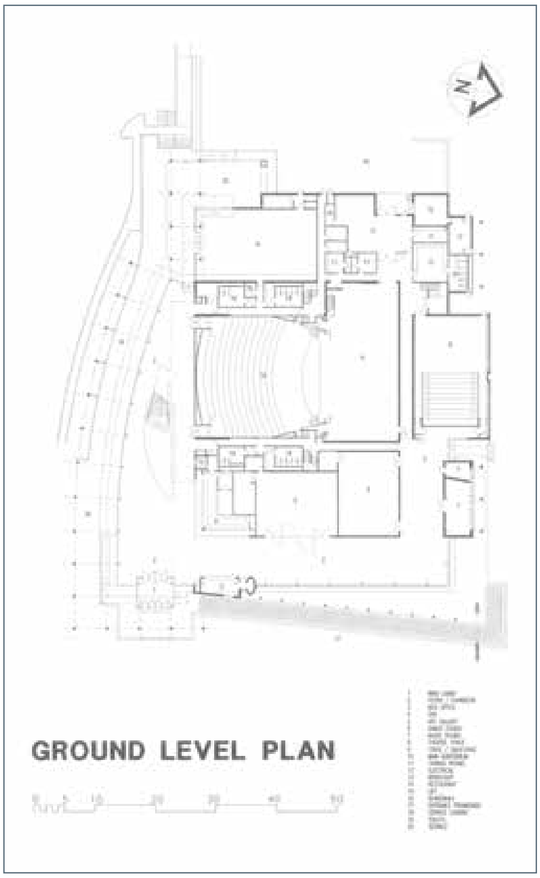
Koorliny Theatre, Kwinana

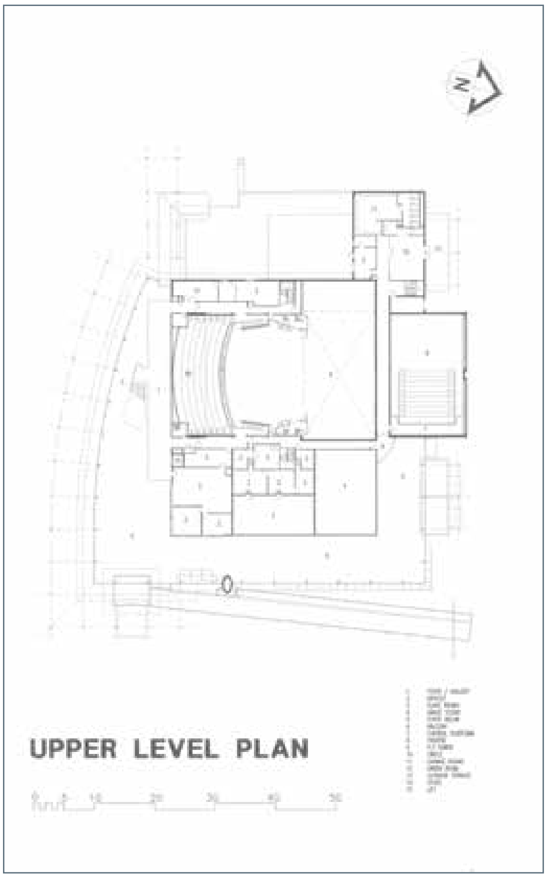
Street Address	20 Sulphur Road
Suburb	Kwinana
Best contact person for venue audit	Ryan Taaffe – General Manager
Map Ref	13
Directions 2031 Region	South-West
Local Government Authority	Town of Kwinana
Phone number	9467 7118
Email	ryan@koorliny.com.au
Venue website	www.koorliny.com.au
Operator and management arrangements	Leased from the Town of Kwinana and managed by a not-for-profit Board. Manage their own ticketing
Funding sources	Town of Kwinana; AMEX Corporation P/L; Kwinana Courier; Kwinana Industries Council; CSBP
Primary purpose	Hiring out the venue
Secondary purpose	Some theatrical productions
Stage configuration options	Stages can be decreased or increased in the 2 theatres
Seating capacity (including seating capacity in all configurations)	1,000 Amphitheatre; 244 proscenium arch theatre; 100 black box theatre. Total capacity is 1,364
Facilities included	Sound and lighting rigs; technician; dressing room. Also has a dance studio, multi-purpose studios and a courtyard, all of which can be used for business functions, product releases, conferences and training programs
Year constructed	1991
Significant renovations - year of works and details	2001 – Amphitheatre added (Bicentennial funding). Looking at potentially increasing stage size and seating capacity
Additional amenities in the facility e.g. Bars, dining venues, exhibition space, meeting rooms	Theatre bar

Source: Supplied by Ryan Taafe, General Manager Koorliny Theatre.

Mandurah Performing Arts Centre, Mandurah

Typical seating and stage layout floorplan





Source: Hames Sharley

Source: Hames Sharley

Source: MPAC supplied image of the Auditorium

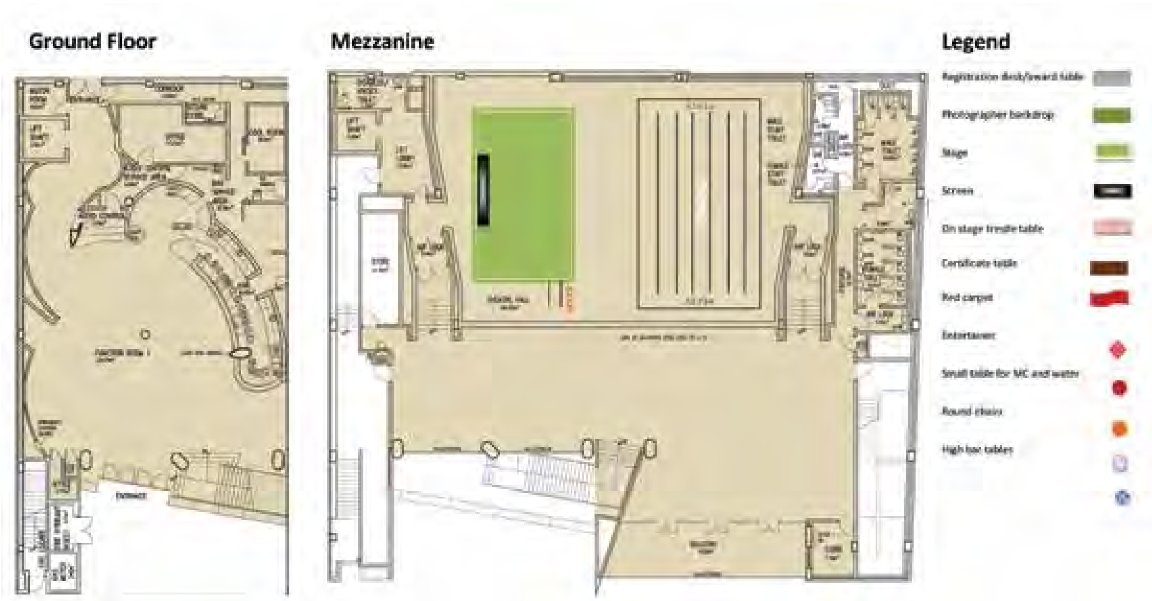
Mandurah Performing Arts Centre, Mandurah

Street Address	Ormsby Terrace
Suburb	Mandurah
Best contact person for venue audit	Christine Steer – Operations Manager
Map Ref	14
Directions 2031 Region	Peel
Local Government Authority	City of Mandurah
Phone number	9550 3930
Email	operations@manpac.com.au
Venue website	http://www.manpac.com.au/
Operator and management arrangements	Owned by City of Mandurah. Managed by not-for-profit Board. Do own ticketing except for on-line tickets which are available through Tickets.com
Funding sources	City of Mandurah; Lotterywest; Bendigo Bank
Primary purpose	Provide arts and culture to Peel community
Secondary purpose	Add to cultural opportunities through workshops, education & recreational programs in visual and performing arts
Stage configuration options	Stages can be enlarged by using the orchestra pit in the Boardwalk Theatre and by retracting seating in the Fishtrap Theatre, in which the stage is part of the floor
Seating capacity (including seating capacity in all configurations)	Seating for a total of 944 patrons: Boardwalk Theatre accommodates 800 and Fishtrap Theatre 144
Facilities included	4 change rooms with showers & toilets; Green Room
Year constructed	1997
Significant renovations - year of works and details	None so far but ideally looking to increase size of the stage and increase seating capacity to the Fishtrap Theatre
Additional amenities in the facility e.g. Bars, dining venues, exhibition space, meeting rooms	Bar

Source: www.media140.com & www.showmeeprth.com.au

Metcalfe Theatre at the Empyrean, Northbridge

Typical seating and stage layout floorplan



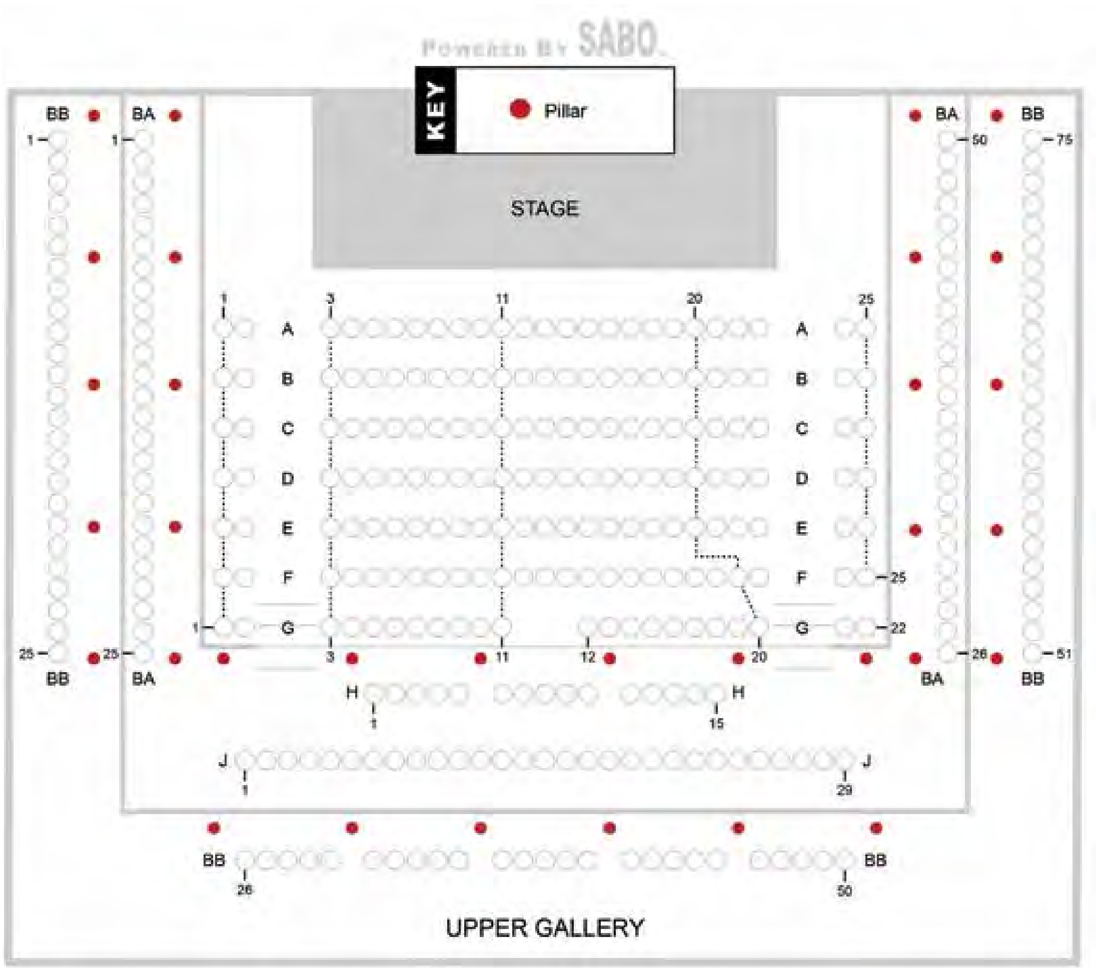
479

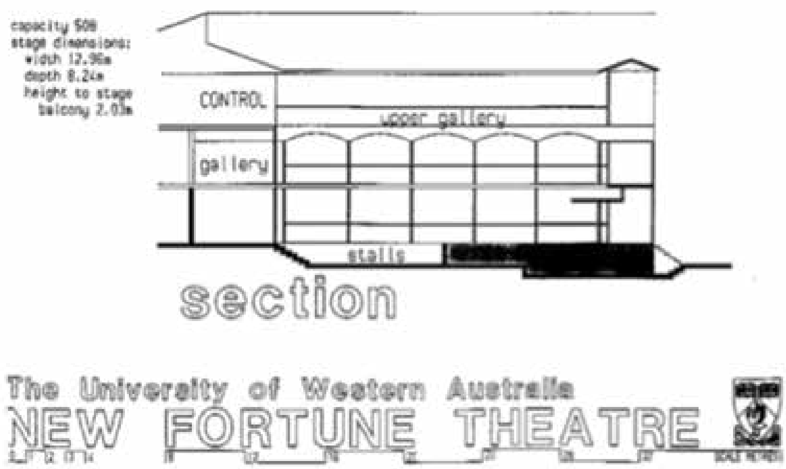
Metcalfe Theatre at the Empyrean, Northbridge

Street Address	12 Lake St
Suburb	Northbridge
Best contact person for venue audit	Sam Outhred – Functions Manager
Map Ref	15
Directions 2031 Region	Central
Local Government Authority	City of Perth
Phone number	9228 1600
Email	sam@empyrean.net.au
Venue website	http://www.empyrean.net.au/
Operator and management arrangements	Venue is owner operated – managed by 2 directors and functions manager. Ticketing through Moshtix
Funding sources	The owners and fees from their hospitality training academy, Empyrean Educational Institute
Primary purpose	Mainly corporate functions. Boasts some of the best acoustics in theatre design. The Metcalfe Theatre offers the best setting for stage productions, visiting entertainers or important corporate seminars
Secondary purpose	Live theatre and awards nights
Stage configuration options	Large stage (17m x 8m) can be reduced by curtains
Seating capacity (including seating capacity in all configurations)	Theatre: 300 but most often capped at 280. Total capacity of theatre, lobby and mezzanine is 550
Facilities included	2 change rooms, Green Room
Year constructed	1997
Significant renovations - year of works and details	2008 – completely re-designed. Looking to potentially build toilets on the ground floor (E Lobby area) so functions can be held in both areas simultaneously
Additional amenities in the facility e.g. Bars, dining venues, exhibition space, meeting rooms	E Lobby has fully licensed bar; 14 TVs; Wi-Fi; DJ equipment; additional audio and visual capabilities Mezzanine has a balcony

New Fortune Theatre, UWA, Crawley

Typical seating and stage layout floorplan





Source: University Theatres

Source: University Theatres

New Fortune Theatre, UWA, Crawley

Street Address	The University of Western Australia, 35 Stirling Highway
Suburb	Crawley
Best contact person for venue audit	Bookings Coordinator
Map Ref	17b
Directions 2031 Region	Central
Local Government Authority	City of Subiaco
Phone number	(08) 6488 7407
Email	bookings-theatres@uwa.edu.au
Venue website	http://www.theatres.uwa.edu.au/venues/fortune
Operator and management arrangements	Run by University Theatres
Funding sources	None
Primary purpose	Performing Arts
Secondary purpose	Education
Stage configuration options	None
Seating capacity (including seating capacity in all configurations)	350
Facilities included	Open air theatre. The only Elizabethan style theatre in the southern hemisphere
Year constructed	1964
Significant renovations - year of works and details	None
Additional amenities in the facility e.g. Bars, dining venues, exhibition space, meeting rooms	None

NIB Stadium

Typical seating and stage layout floorplan

Source: Supplied by NIB Stadium - ww.nibstadium.com.au

NIB Stadium

Street Address	310 Pier Street
Suburb	Perth
Best contact person for venue audit	Sam Burling (Brand Manager)
Map Ref	16
Directions 2031 Region	Central
Local Government Authority	City of Vincent
Phone number	(08) 9422 1500
Email	info@nibstadium.com.au
Venue website	http://www.nibstadium.com.au/
Operator and management arrangements	Allia Venue Management Ticketing through Ticketmaster (currently) Catering through Mustard Catering

Funding sources	Confidential, however nib Health Cover is the 'stadium' naming rights sponsor and Bankwest is the 'shed' naming rights sponsor.
Primary purpose	Multi-purpose rectangular facility primarily for hosting sporting events, though also for concerts and functions in spaces throughout the stadium.
Secondary purpose	Concerts
Stage configuration options	Feasible for variety of uses: Sport and Stage with floor standing or seating, function spaces with various layout options.
Seating capacity (including seating capacity in all configurations)	The stadium encompasses an area of approximately 4.4 hectares with a playing surface of 132 metres by 88 metres. NIB Stadium maximum spectator capacity for sporting events will be 20,565 once the State Government redevelopment is completed. The facility can cater for up to 35,000 spectators for concerts including standing on the pitch.
Facilities included	• Playing area with lights • Team change rooms • Referee rooms • Physiotherapy rooms • Function rooms • Corporate suites
Year constructed	The land on which the stadium was built was made a public reserve in 1904 where rugby was played. Perth Oval Main ground was developed in 1910.
Significant renovations - year of works and details	2003 - $11.4 million redevelopment to transform it into a rectangular pitch (funded by State & Local governments) 2009/2010 - installation of temporary seating and corporate facilities 2012/2013 - $95.14 million redevelopment including: • replacing temporary seating in the east with a permanent undercover stand containing a range of corporate, retail, toilet, merchandise and storage facilities; • replacing temporary seating the south with a permanent uncovered stand; • a new Gate 4 incorporating additional entry points and box offices; • a new marquee will be installed in the south; • new pitch flood lighting towers and a new control room will be installed in the SE corner of the ground; • new corporate facilities will be installed in the NE corner of the ground; • 2 large, permanent screens will be installed onto the NW and SE corners of the venue; • LED signage will be installed along the eastern pitch perimeter; • a range of works will be under taken at Gate 1 to address cosmetic and risk items; and • the pitch will be reconstructed and seating installed into the northern bowl from July to October 2013.
Additional amenities in the facility e.g. Bars, dining venues, exhibition space, meeting rooms	• VIP Event Facilities • Function rooms • Media Facilities • Lounge

Source: www.lostoncampus.com.au

Source: www.nearmap.com

Octagon Theatre, UWA, Crawley

Typical seating and stage layout floorplan

Source: University Theatres

Octagon Theatre, UWA, Crawley

Street Address	The University of Western Australia, 35 Stirling Highway
Suburb	Crawley
Best contact person for venue audit	Bookings Coordinator
Map Ref	17c
Directions 2031 Region	Central
Local Government Authority	City of Subiaco
Phone number	6488 7407
Email	Bookings-theatres@uwa.edu.au
Venue website	http://www.theatres.uwa.edu.au/venues/octagon
Operator and management arrangements	Run by University Theatres
Funding sources	None
Primary purpose	Performing Arts
Secondary purpose	Education
Stage configuration options	Standard, Orchestra, Double Stage Extension, Platform
Seating capacity (including seating capacity in all configurations)	Standard 701, Orchestra Pit 701, Stage Extension 663, Forestage Seating 758
Facilities included	Full performance facilities
Year constructed	1969
Significant renovations - year of works and details	None
Additional amenities in the facility e.g. Bars, dining venues, exhibition space, meeting rooms	Bar, rehearsal studio and workshop

Source: University Theatres & UWA Website




Paterson's Stadium

Typical seating and stage layout floorplan

Source: www.ticketmaster.com.au

Paterson's Stadium

Street Address	Subiaco Road
Suburb	Subiaco
Best contact person for venue audit	Shane Harris
Map Ref	18
Directions 2031 Region	Central
Local Government Authority	City of Subiaco
Phone number	(08) 9381 2187
Email	sharris@wafc.com.au
Venue website	http://www.patersonsstadium.com.au/
Operator and management arrangements	Venue managed by WAFC
Ticketing through Ticketmaster	
Funding sources	Internal
Primary purpose	AFL and other major sporting events
Secondary purpose	Concerts and functions
Stage configuration options	Feasible for variety of uses: Sport and Stage with field standing
Seating capacity (including seating capacity in all configurations)	43,405 AFL games Up to 60,000 in concert mode with full venue and oval use
Facilities included	TAB, Wheelchair bays, Cash facilities, Oval with night lighting, Scoreboards and Video Screens.
Year constructed	1908
Significant renovations - year of works and details	3 Tier Stand - Opened 31 August 1969 2 Tier Stand - Opened 27 April 1981 NAB Stand - Opened 14 May 1995 Eastern Stand - Opened 11 March 2000
Additional amenities in the facility e.g. Bars, dining venues, exhibition space, meeting rooms	7 Function rooms

Source: www.perthnow.com.au

www.thedailytelegraph.com.au

www.yoursubi.com.au

Perth Arena, Perth

Typical seating and stage layout floorplan

Basketball layout

Note: As seating can change for different events and performances, the seating map below should be used as a guide only.

Source: Perth Arena website

Perth Arena, Perth

Street Address	700 Wellington Street
Suburb	Perth
Best contact person for venue audit	John Lynch
Map Ref	19
Directions 2031 Region	Central
Local Government Authority	City of Perth
Phone number	9441 8222
Email	info@pertharena.com.au
Venue website	http://www.pertharena.com.au
Operator and management arrangements	Owned by VenuesWest on behalf of the State Government. Managed by Ogden IFC. Ticketing through Ticketmaster
Funding sources	Government of Western Australia
Primary purpose	Providing a world class venue for entertainment productions and international performers
Secondary purpose	Venue for sporting and corporate events. Home of the Perth Wildcats and the Hopman Cup
Stage configuration options	Feasible for a variety of uses
Seating capacity (including seating capacity in all configurations)	The Perth Arena can seat 15,500 patrons. A flexible curtaining system makes many sizes and configurations, down to 3,500. The Granite Room can seat up to 510 in theatre style
Facilities included	Retractable roof; tennis court; LED super screen in main bowl (13.6 x 8m); 5 function rooms; 36 hospitality suites for VIP patrons; catering, merchandise & beverage outlets; underground parking
Year constructed	2007 - 2012 (opened 10 November 2012)
Significant renovations - year of works and details	None
Additional amenities in the facility e.g. Bars, dining venues, exhibition space, meeting rooms	Bars, food outlets, function rooms

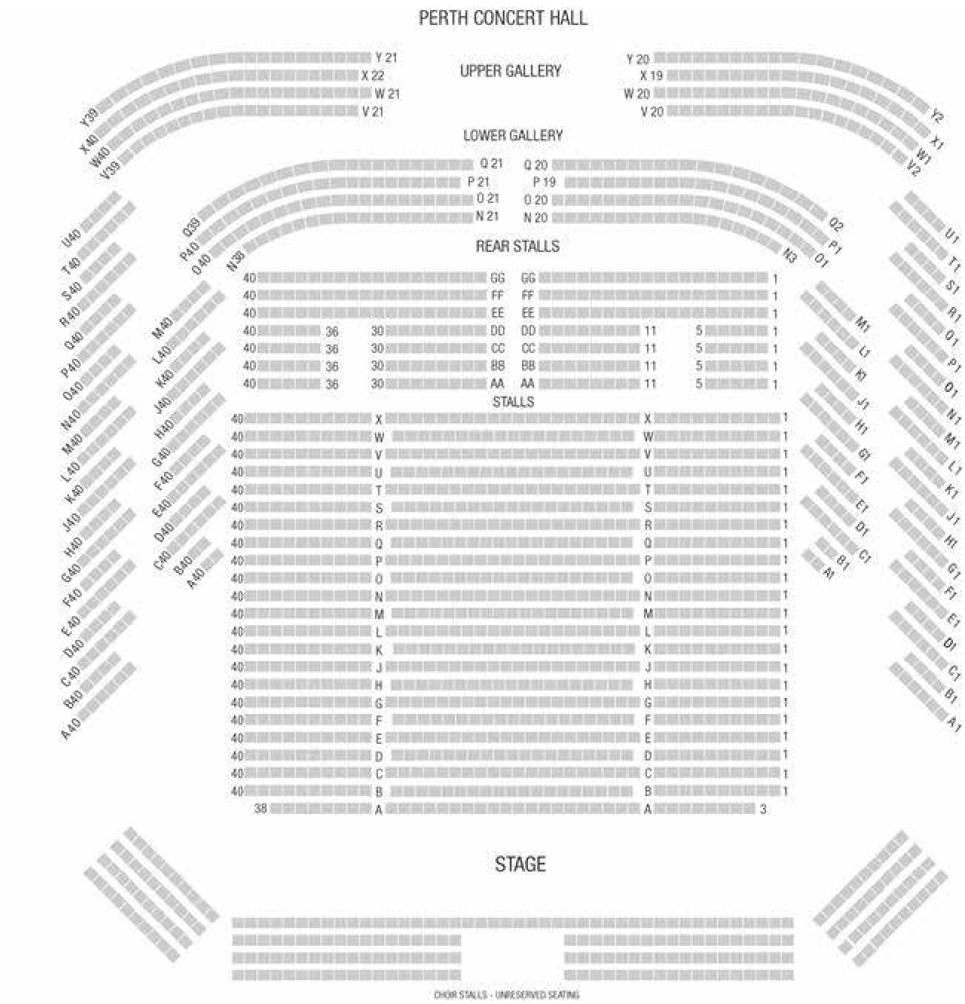
Source: Photo supplied by VenuesWest

Source: Image supplied by Perth Theatre Trust

Source: PCH website

Perth Concert Hall, Perth

Typical seating and stage layout floorplan



Perth Concert Hall, Perth

Street Address	5 St Georges Tce
Suburb	Perth
Best contact person for venue audit	Alan Ferris – General Manager Perth Theatre Trust Ph: 6552 7552
Map Ref	20
Directions 2031 Region	Central
Local Government Authority	City of Perth
Phone number	9231 9900
Email	Alan.ferris@ptt.wa.gov.au
Venue website	www.perthconcerthall.com.au or http://www.perththeatretrust.com.au/
Operator and management arrangements	The Perth Concert Hall, is owned by the City of Perth and has been leased to the Perth Theatre Trust since 1980. The day to day operations of the Perth Concert Hall are managed by the external service provider, AEG Ogden (Perth). Ticketing is through Ticketek
Funding sources	City of Perth
Primary purpose	The facility is the principal performing and rehearsal venue of the West Australian Symphony Orchestra. In addition to regular seasons by the Orchestra, other fine arts companies use the venue
Secondary purpose	The Perth Concert Hall is also hired by many organisations that present leading international contemporary artists. Also plays a civic role in hosting university and school graduations, business conventions and civic functions
Stage configuration options	20m wide at front, tapering to 14m at rear. Extensions available
Seating capacity (including seating capacity in all configurations)	1,731 divided into 3 main levels
Facilities included	The main foyer level accommodates offices, a ticketing outlet, a café and the Wardle Room which is available for hire for functions
Year constructed	1971-73
Significant renovations - year of works and details	1982 extend into VIP car park area to provide additional office accommodation; 1984 Forecourt landscaped; 1985 Cooling towers in air conditioning replaced; c.1988 Concert Hall re-roofed; c.1992 Restaurant refurbished; asbestos removed; 1994 New artists' facility completed; 1998 Replacement of air conditioning; 1999 Pedestrian link between Commonwealth Family Law Courts and Concert Hall; 2008 Major upgrades to the concrete exterior of the concert hall; 2011 replaced escalators between main entrance and underground car park
Additional amenities e.g. Bars, dining venues, exhibition space, meeting rooms	Restaurant

Perth Zoo

Typical seating and stage layout floorplan

Source: www.perthzoo.wa.gov.au - extract from Perth Zoo Masterplan

Perth Zoo

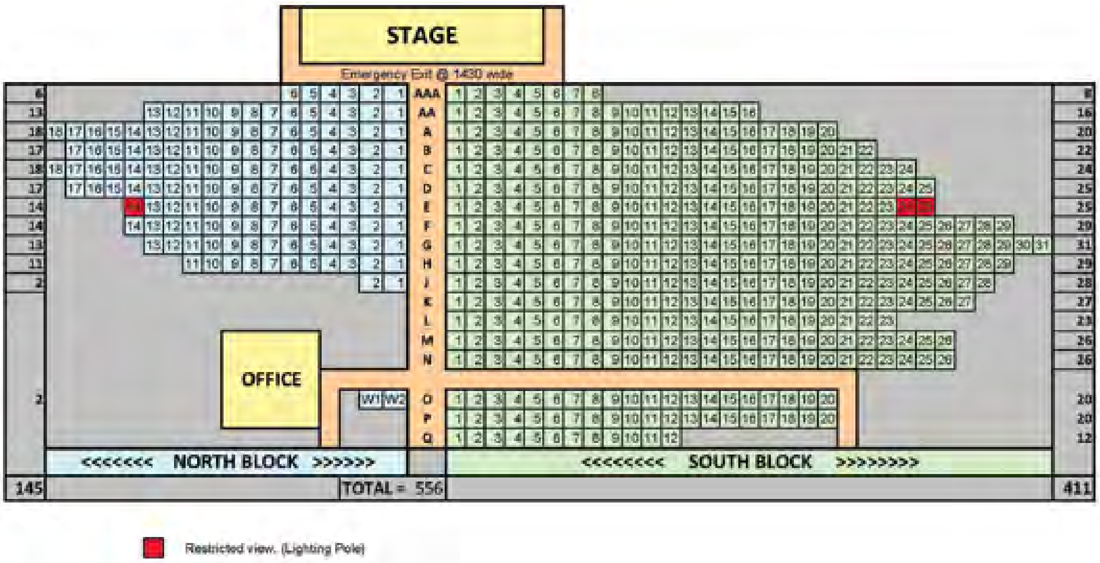
Street Address	20 Labouchere Road
Suburb	South Perth
Best contact person for venue audit	Ceri Price, Commercial Operations Manager
Map Ref	21
Directions 2031 Region	Central
Local Government Authority	City of South Perth
Phone number	(8) 9474 0444
Email	email@perthzoo.wa.gov.au
Venue website	http://www.perthzoo.wa.gov.au/
Operator and management arrangements	Perth Zoo Most concerts outsourced to external promoters Ticketing available through Ticketmaster Catering through Mustard Catering (Spotless)
Funding sources	Self funded revenue, Government funding (Government Agency)
Primary purpose	Recreation, wildlife conservation research, animal breeding and conservation education
Secondary purpose	Functions and events
Stage configuration options	Temporary major concert stage
Seating capacity (including seating capacity in all configurations)	Max capacity 4,500 with other options from 30+ pax
Facilities included	Concert area with lawn dance area, function centre, conference centre, small lawns, marquee, cafes, outdoor theatre. Full catering options through Mustard Catering
Year constructed	1898
Significant renovations - year of works and details	Too many to mention
Additional amenities in the facility e.g. Bars, dining venues, exhibition space, meeting rooms	Wedding, meeting and conference functions Group Picnic facilities, Children Birthday facilities, Catering, 2x cafes and function room, Exhibit spaces for functions, Carousel, Giraffe feeding tower, Japanese Gardens with outdoor amphitheatre

Source: Supplied by Perth Zoo and www.perthzoo.wa.gov.au

Source: Jon Davison/eyeinthesky.com.au

Quarry Amphitheatre, City Beach

Typical seating and stage layout floorplan



Source: Justin Friend, Quarry Amphitheatre

Quarry Amphitheatre, City Beach

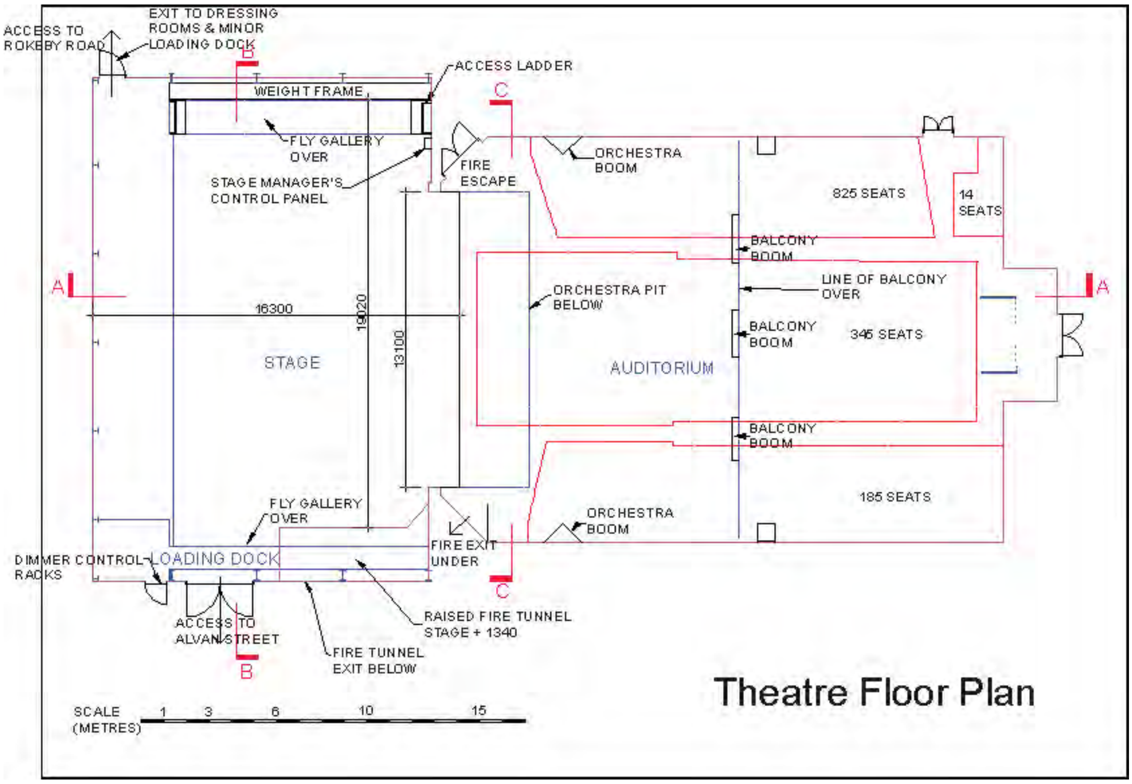
Street Address	Reabold Hill, Oceanic Dve
Suburb	City Beach
Best contact person for venue audit	Justin Friend – Events coordinator
Map Ref	22
Directions 2031 Region	Central
Local Government Authority	Town of Cambridge
Phone number	9385 7144
Email	
Venue website	www.quarryamphitheatre.com.au
Operator and management arrangements	Owned and operated by Town of Cambridge Ticketing through Ticketmaster
Funding sources	Town of Cambridge
Primary purpose	Hire of venue for performances
Secondary purpose	Hire of venue for corporate and private events
Stage configuration options	23m x 19m open air fixed stage
Seating capacity (including seating capacity in all configurations)	556
Facilities included	2 dressing rooms underneath the stage (cavern area) with showers/toilets; rehearsal floor
Year constructed	1986
Significant renovations - year of works and details	None to date, but plans in pipeline for major redevelopment which is definitely needed
Additional amenities in the facility e.g. Bars, dining venues, exhibition space, meeting rooms	Cafe

Source: Supplied by Quarry Amphitheatre

Source: Permission (Stan Bird) to use from website (www.regaltheatre.com.au)

Regal Theatre, Subiaco

Typical seating and stage layout floorplan



Source: www.regaltheatre.com.au

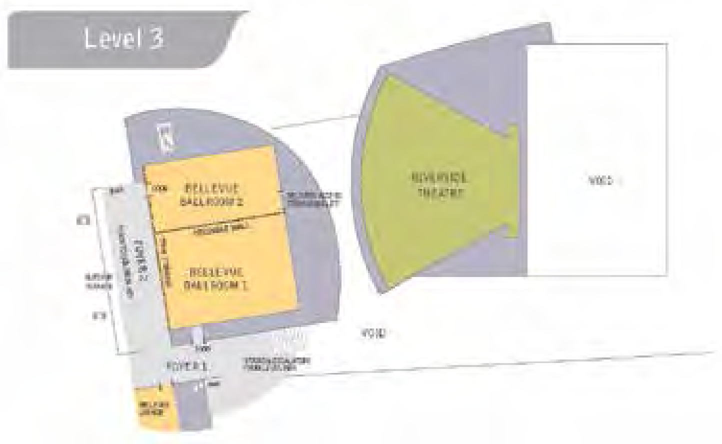
Regal Theatre, Subiaco

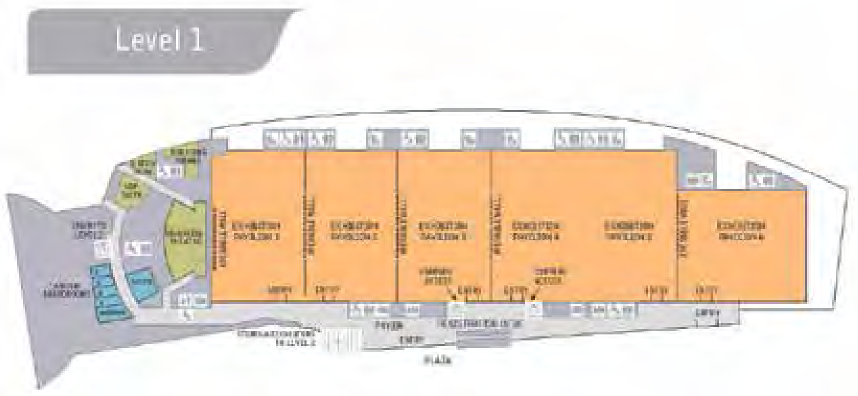
Street Address	474 Hay St
Suburb	Subiaco
Best contact person for venue audit	Kim Knight – Manager
Map Ref	23
Directions 2031 Region	Central
Local Government Authority	City of Subiaco
Phone number	1300 795 012 0448 111 308 (Kim)
Email	kim@regaltheatre.com.au
Venue website	www.regaltheatre.com.au
Operator and management arrangements	Interstar leases theatre from Baker Theatre Trust. Tickets through Ticketek
Funding sources	No external funding source
Primary purpose	Live performances – concerts and theatre
Secondary purpose	Nil
Stage configuration options	Large stage can be made smaller by using curtains
Seating capacity (including seating capacity in all configurations)	1,086
Facilities included	7 dressing rooms; Green room with kitchen & lounge facilities, bathrooms & showers
Year constructed	1937-38
Significant renovations - year of works and details	Future renovations required – subject to finance
Additional amenities in the facility e.g. Bars, dining venues, exhibition space, meeting rooms	Bar & lounge upstairs, ticketing office downstairs

Source: Permission (Stan Bird) to use from website (www.regaltheatre.com.au)

Riverside Theatre, PCEC, Perth

Typical seating and stage layout floorplan





Source: PCEC website

499

Riverside Theatre, PCEC, Perth

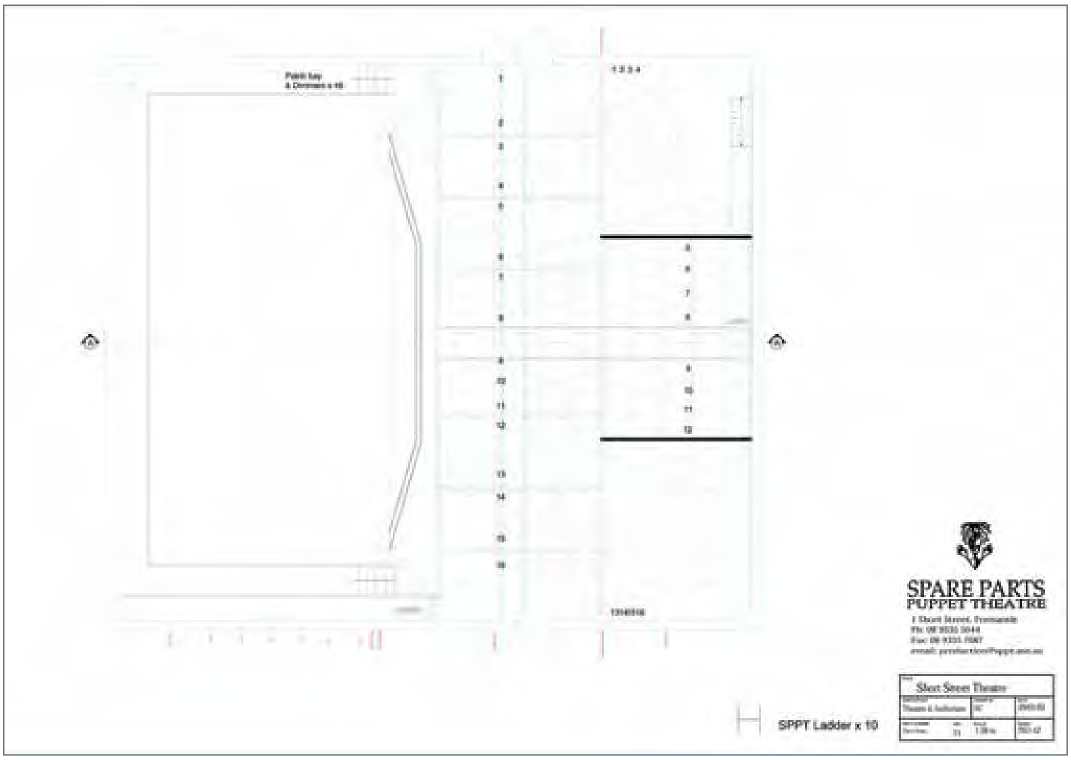
Street Address	21 Mounts Bay Rd
Suburb	Perth
Best contact person for venue audit	Jay Pustkuchen, Head of Operations
Map Ref	24
Directions 2031 Region	Central
Local Government Authority	City of Perth
Phone number	9338 0300
Email	info@pcec.com.au
Venue website	http://www.pcec.com.au/home.aspx
Operator and management arrangements	Privately owned and is operated exclusively by Spotless Facility Services Pty Ltd. Tickets sold through Ticketek
Funding sources	Privately funded
Primary purpose	Catering for large exhibitions, conferences and events
Secondary purpose	None
Stage configuration options	Can be half or full sized; uses 2m and 4m extensions
Seating capacity (including seating capacity in all configurations)	The Riverside Theatre can seat 2,500 patrons
Facilities included	State of the Art lighting & sound; 3 projectors; Green Room; VIP room; 4 dressing rooms; hearing augmentation throughout; 2 interpreter booths
Year constructed	2004
Significant renovations - year of works and details	None
Additional amenities in the facility e.g. Bars, dining venues, exhibition space, meeting rooms	Expresso bar in foyer, other bar in foyer

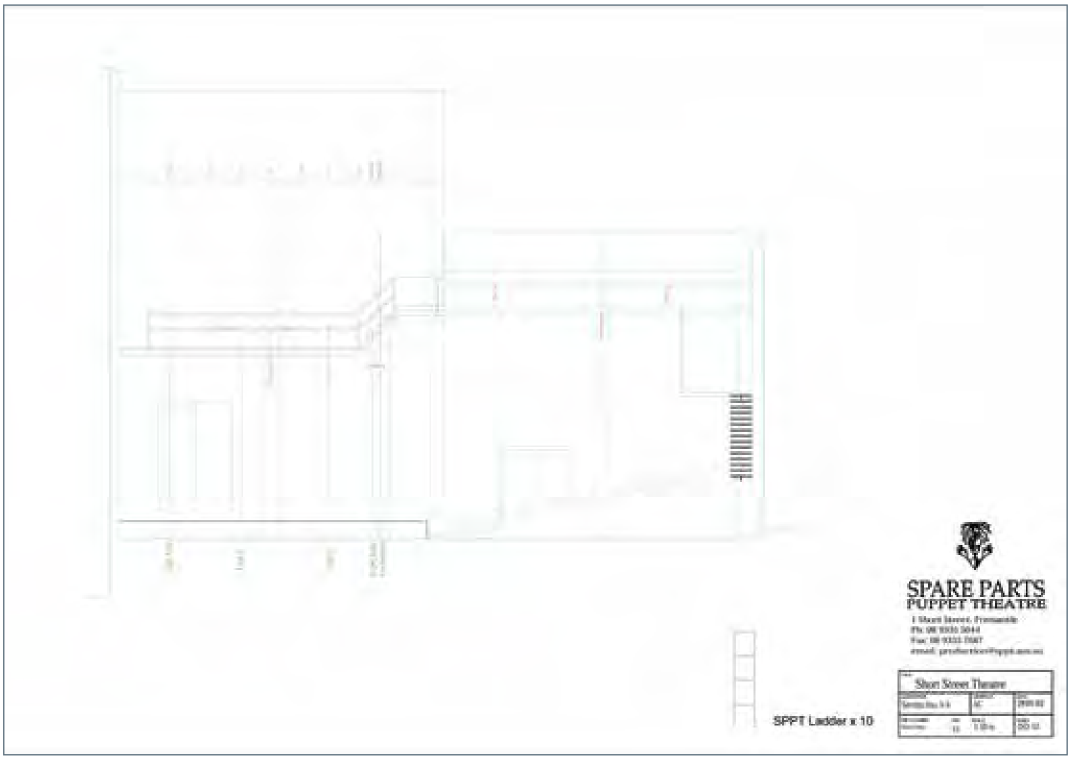
Source: PCEC website



Short Street Theatre, Fremantle

Typical seating and stage layout floorplan





501

Short Street Theatre, Fremantle

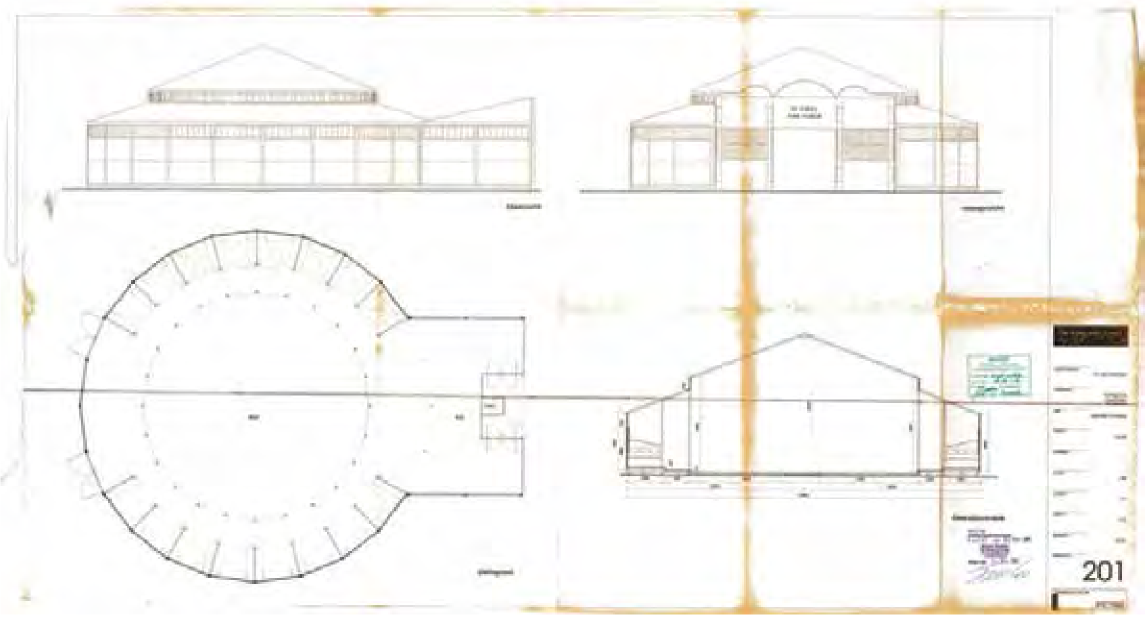
Street Address	1 Short St
Suburb	Fremantle
Best contact person for venue audit	Megan Roberts – Business Manager
Map Ref	25
Directions 2031 Region	Central
Local Government Authority	City of Fremantle
Phone number	9335 5044
Email	admin@sppt.asn.au
Venue website	http://www.sppt.asn.au/
Operator and management arrangements	Owned by State Government – Spare Parts Puppet Theatre lease and arrange all activities and bookings
Funding sources	State Government Department of Culture and the Arts
Primary purpose	Spare Parts Puppet Theatre
Secondary purpose	Hire out occasionally, mainly for the Fremantle Festival
Stage configuration options	Static stage (no options to extend) but can be made smaller by curtaining
Seating capacity (including seating capacity in all configurations)	Licensed for 215 but usually cap seating at 190
Facilities included	Rehearsal space; foyer which houses the Puppet Museum
Year constructed	Facade is heritage listed
Significant renovations - year of works and details	Extensions were made but not sure of the year. Ideally looking for a major renovation to increase capacity
Additional amenities in the facility e.g. Bars, dining venues, exhibition space, meeting rooms	None

Source: www.sppt.com.au; www.panaramio.com: Diana house (sauvaehouse113)

Source: www.goodperthhunting.wordpress.com

Spiegeltent

Typical seating and stage layout floorplan



503

Spiegeltent

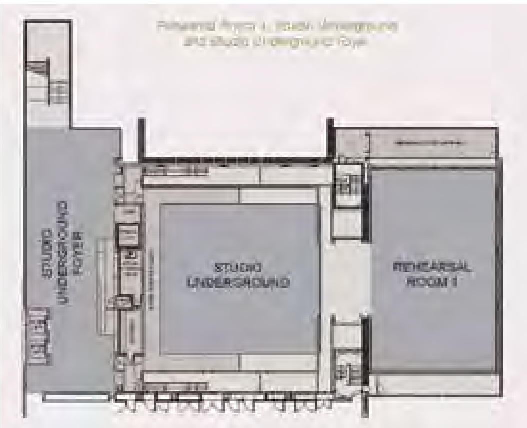
Street Address	Mobile venue
Suburb	Mobile venue
Best contact person for venue audit	Amber Hasler
Map Ref	26
Directions 2031 Region	Central
Local Government Authority	Mobile venue
Phone number	92276288
Email	amber@artrage.com.au
Venue website	artrage.com.au / fringeworld.com.au / fringeontheroad.com.au
Operator and management arrangements	ARTRAGE
Funding sources	Various
Primary purpose	Cabaret & Theatre
Secondary purpose	Music & Comedy
Stage configuration options	Variable
Seating capacity (including seating capacity in all configurations)	260 - 320
Facilities included	All
Year constructed	Acquired by Artrage 2010 from Klessen Family of Llommer. Some components over 100 years old
Significant renovations - year of works and details	None
Additional amenities in the facility e.g. Bars, dining venues, exhibition space, meeting rooms	None

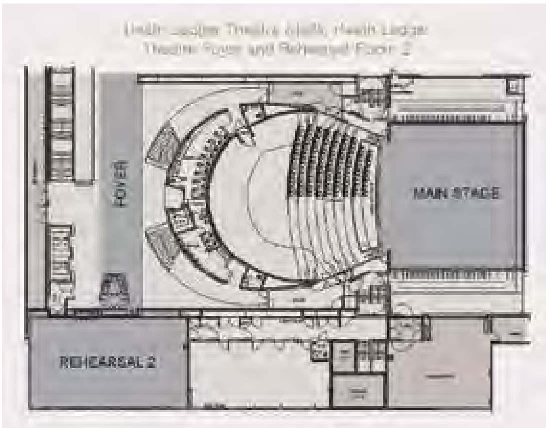
Source: www.goodperthhunting.wordpress.com

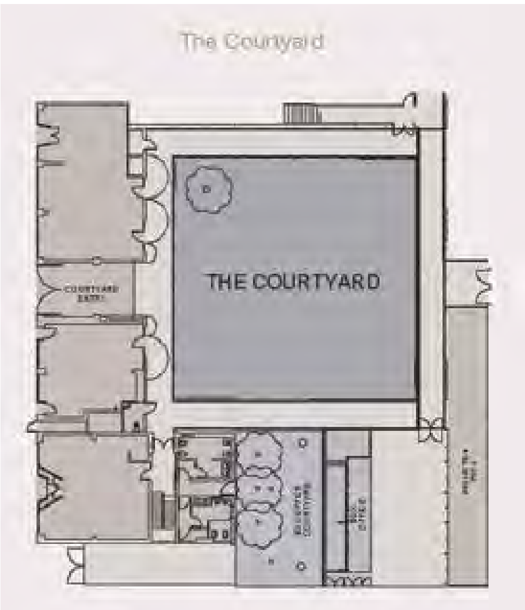
Source: Kerry Hill Architects CentreStage winning design for the State Theatre Centre of WA

State Theatre Centre, Northbridge

Typical seating and stage layout floorplan







Source: The State Theatre Centre

State Theatre Centre, Northbridge

Street Address	174-176 William Street, cnr Roe St
Suburb	Northbridge
Best contact person for venue audit	Alan Ferris, General Manager, Perth Theatre Trust Ph: 6552 7552
Map Ref	27
Directions 2031 Region	Central
Local Government Authority	City of Perth
Phone number	9212 9300
Email	Alan.ferris@ptt.wa.gov.au
Venue website	www.bsstc.com.au http://www.perththeatretrust.com.au/
Operator and management arrangements	The day to day operations of The Centre are managed on behalf of the Perth Theatre Trust by the external service provider, AEG Ogden (Perth). Ticketing through Ticketek
Funding sources	State Government (Dept of Culture and the Arts)
Primary purpose	The State Theatre Centre presents contemporary performing arts, such as theatre and dance, in diverse ways with a focus on distinctive professional and contemporary work produced locally, nationally and internationally
Secondary purpose	The State Theatre Company and The Black Swan Theatre are located at the venue
Stage configuration options	Variable
Seating capacity (including seating capacity in all configurations)	575 seats Heath Ledger Theatre, 234 seats Studio Underground
Facilities included	The Courtyard, a multi-purpose outdoor events space; two rehearsal rooms; two flexible use private suites; a running wardrobe and workshop
Year constructed	2007-2010
Significant renovations - year of works and details	None
Additional amenities in the facility e.g. Bars, dining venues, exhibition space, meeting rooms	Breakout room, Bar, Restaurant

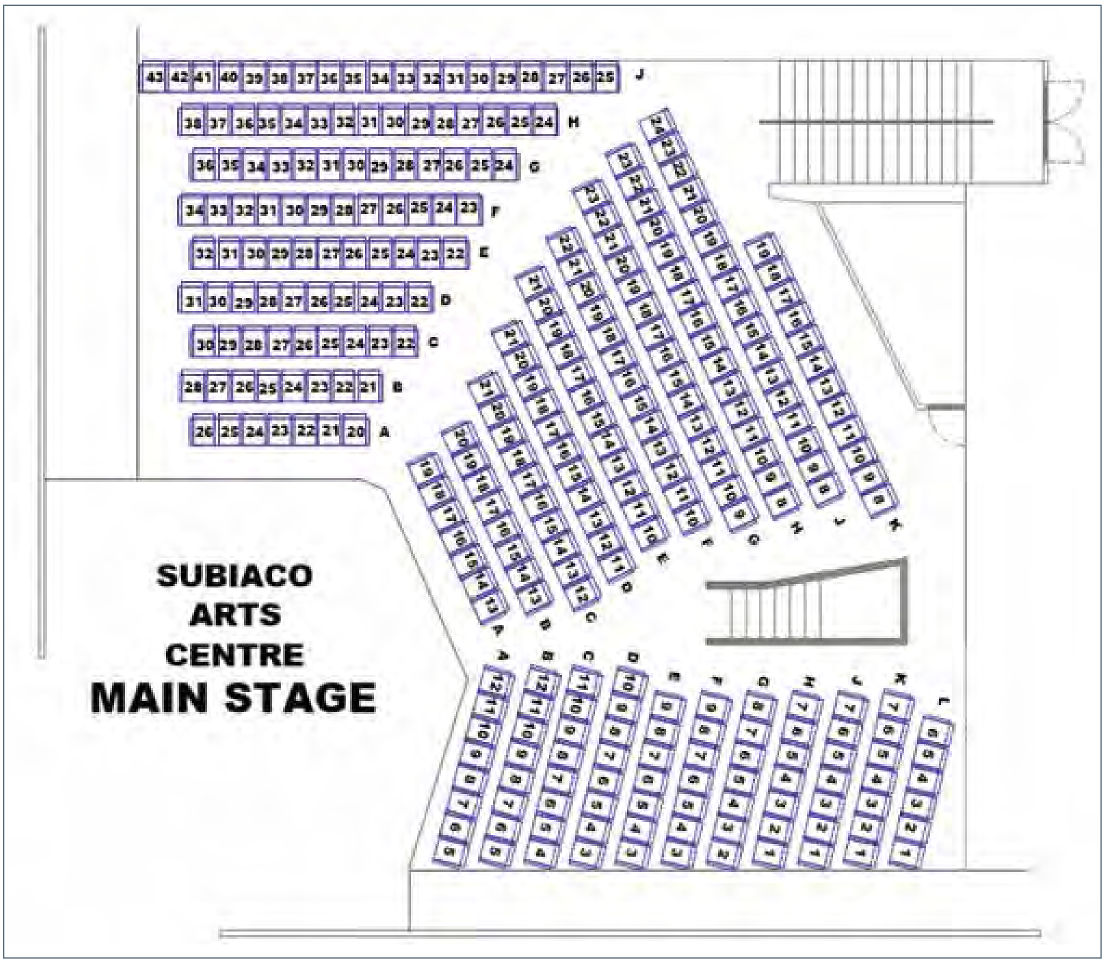
Source: The State Theatre Centre ; www.2011.Perthfesitval.com.au ; www.heraldsun.com.au



Source: Image supplied by Perth Theatre Trust

Subiaco Arts Centre, Subiaco

Typical seating and stage layout floorplan



Source: www.subiacoartscentre.com.au

Subiaco Arts Centre, Subiaco

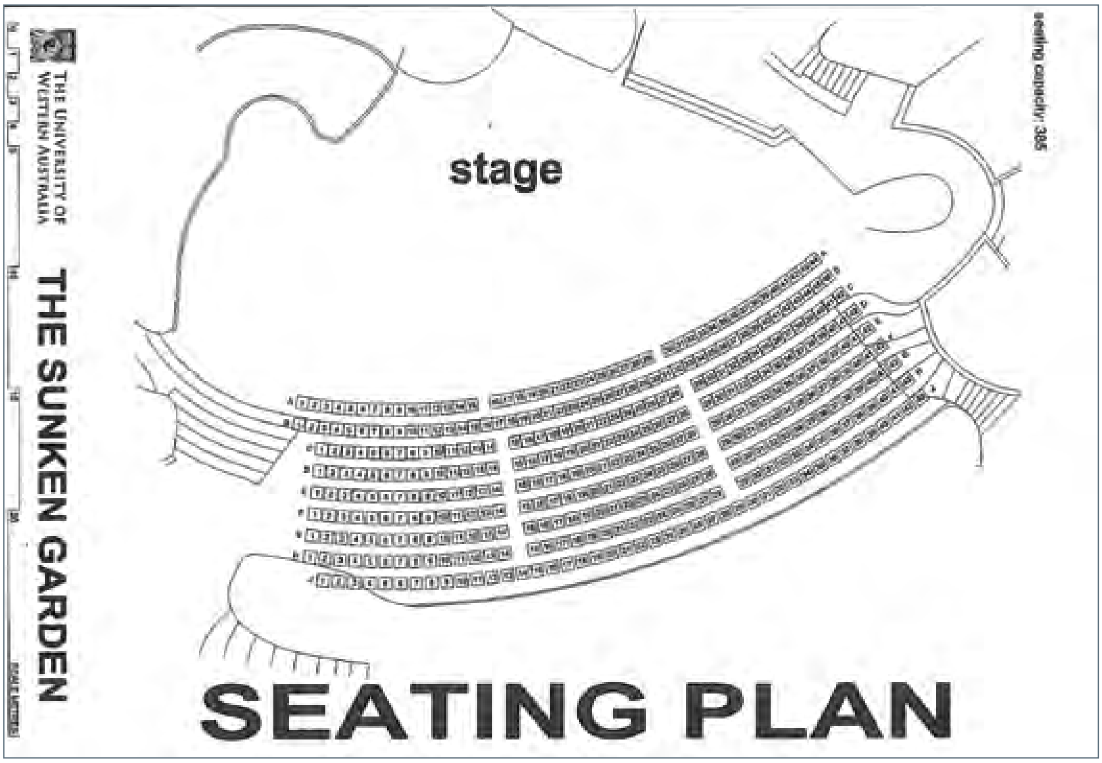
Street Address	180 Hamersley Rd
Suburb	Subiaco
Best contact person for venue audit	Alan Ferris, General Manager, Perth Theatre Trust Phone: 6552 7552
Map Ref	28
Directions 2031 Region	Central
Local Government Authority	City of Subiaco
Phone number	(08) 9323 3400
Email	
Venue website	www.perththeatretrust.com.au
Operator and management arrangements	The Subiaco Arts Centre is owned by the City of Subiaco. The Perth Theatre Trust has leased the Centre since 1984 when the building, originally built as the Subiaco City Hall, was converted to a performing arts centre The day to day operations are managed by the external service provider, AEG Ogden. Ticketing through Ticketek
Funding sources	City of Subiaco
Primary purpose	Theatre
Secondary purpose	Barking Gecko Theatre Company is based here
Stage configuration options	Fixed stage
Seating capacity (including seating capacity in all configurations)	Main auditorium seats 305, Studio seats 115 and amphitheatre seats 500. Total capacity of 920
Facilities included	Ticketing Outlet on the ground floor of the Centre
Year constructed	1956 as the Subiaco Town Hall
Significant renovations - year of works and details	In 2006 a $4.7 million refurbishment was carried out by the State Government and the City of Subiaco. Renovations included upgraded rehearsal, studio and theatre spaces, improved patron amenities and disability access
Additional amenities in the facility e.g. Bars, dining venues, exhibition space, meeting rooms	Bar Foyer, Bar Foyer Alcove, Rehearsal room, Gallery, multi-purpose room, The Undercroft and a meeting room

Source: www.psstuctures.com.au

Source: Image by OlyaB : www.justberry.com.au

Sunken Gardens, UWA, Crawley

Typical seating and stage layout floorplan



Source: University Theatres

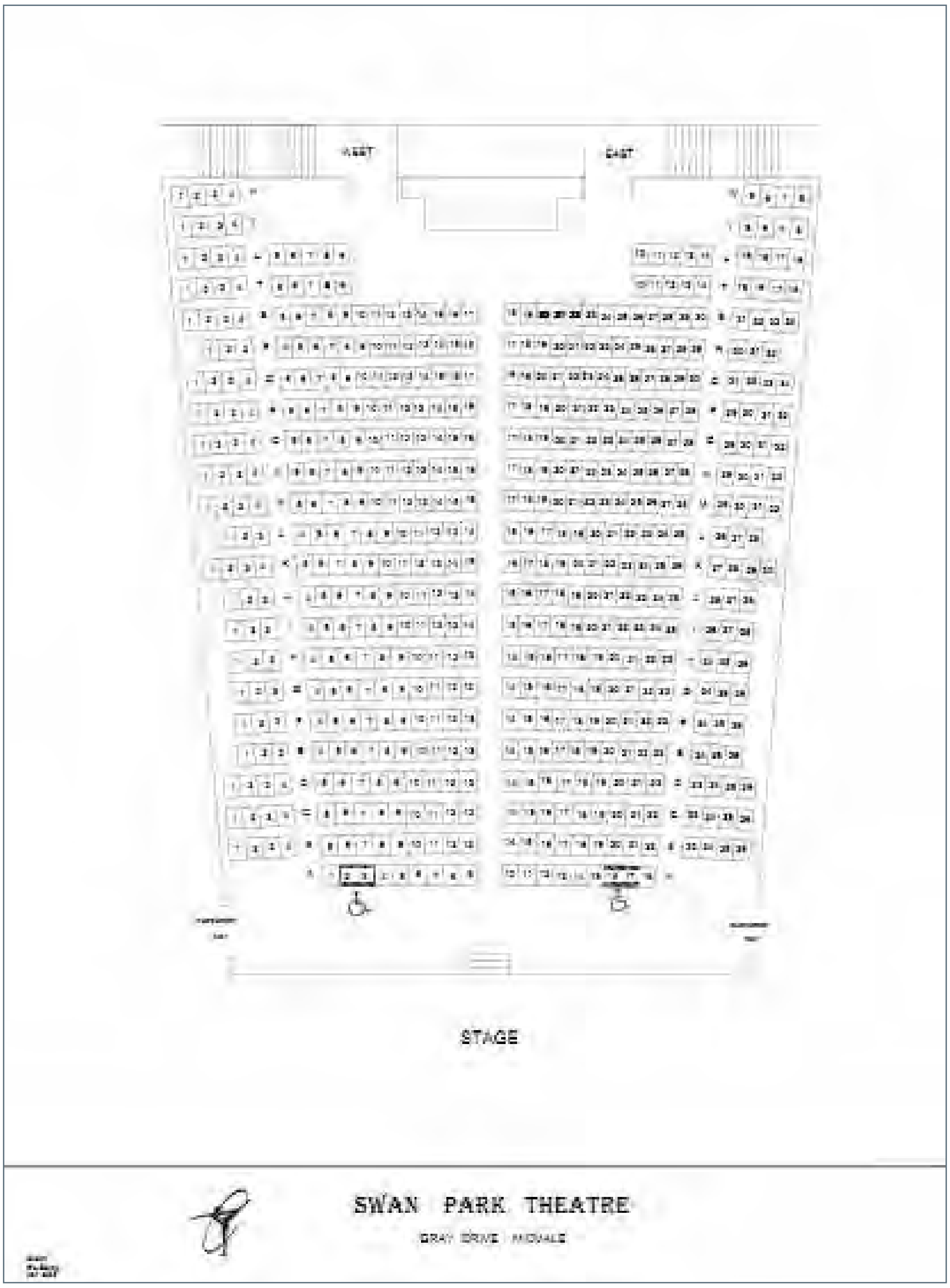
Source: www.treasures.uwa.edu.au

Sunken Gardens, UWA, Crawley

Street Address	The University of Western Australia, 35 Stirling Highway
Suburb	Crawley
Best contact person for venue audit	Bookings Coordinator
Map Ref	17d
Directions 2031 Region	Central
Local Government Authority	City of Subiaco
Phone number	6488 7407
Email	bookings-theatres@uwa.edu.au
Venue website	http://www.theatres.uwa.edu.au/venues/sunken-garden
Operator and management arrangements	Run by University Theatres
Funding sources	None
Primary purpose	Performing Arts
Secondary purpose	Education
Stage configuration options	Fixed Stage
Seating capacity (including seating capacity in all configurations)	300 (on grass), 385 (on seats)
Facilities included	Open air auditorium
Year constructed	1929
Significant renovations - year of works and details	None
Additional amenities in the facility e.g. Bars, dining venues, exhibition space, meeting rooms	None

Swan Park Theatre, Midvale

Typical seating and stage layout floorplan



Source: Image by OlyaB : www.justberry.com.au

Swan Park Theatre, Midvale

Street Address	Gray Drive
Suburb	Midvale
Best contact person for venue audit	Carolyn Selby – Manager
Map Ref	29
Directions 2031 Region	North-East
Local Government Authority	City of Swan
Phone number	9274 3958
Email	info@swanparktheatre.com.au
Venue website	www.swanparktheatre.com.au
Operator and management arrangements	Run by Calisthenics WA
Funding sources	State Government Department of Sport & Recreation
Primary purpose	Purpose built Calisthenics Theatre – the home of Calisthenics WA
Secondary purpose	Hired out to external agencies – schools, colleges, community groups, international touring groups
Stage configuration options	Fixed Stage
Seating capacity (including seating capacity in all configurations)	594
Facilities included	$10m^2$ stage, 17 dressing rooms and rehearsal room
Year constructed	1990
Significant renovations - year of works and details	Unsure of date - Additional dressing rooms
Additional amenities in the facility e.g. Bars, dining venues, exhibition space, meeting rooms	Foyer, kiosk, meeting room

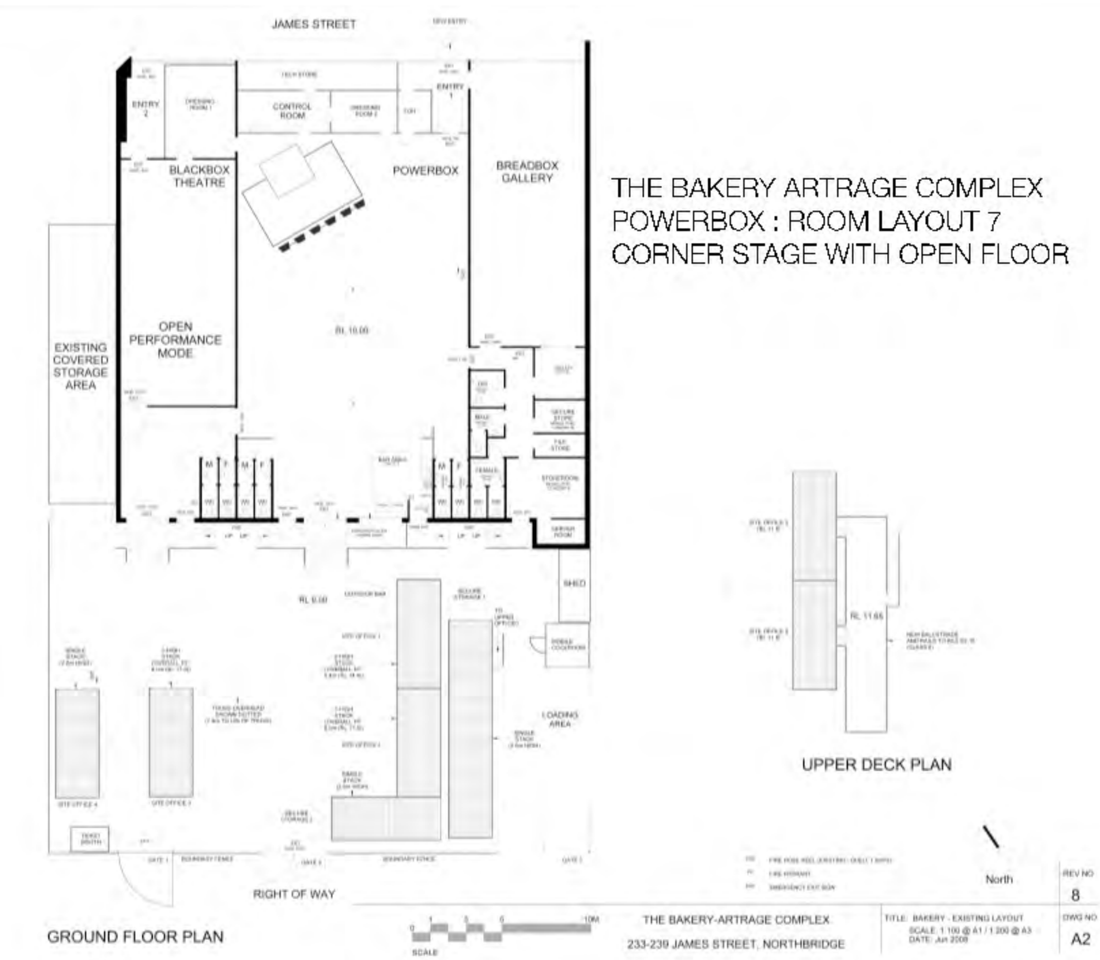
Source: Image by OlyaB : www.justberry.com.au

Source: www.swan.wa.gov.au

Source: www.somewhereelse.com.au

The Bakery

Typical seating and stage layout floorplan



513

The Bakery

Street Address	233 James St
Suburb	Northbridge
Best contact person for venue audit	Amber Hasler
Map Ref	30
Directions 2031 Region	Central
Local Government Authority	City of Perth
Phone number	9227 6288
Email	amber@artrage.com.au
Venue website	www.artrage.com.au / www.nowbaking.com.au
Operator and management arrangements	ARTRAGE
Funding sources	Box office, bar, venue hire
Primary purpose	Music Venue / Multi-arts
Secondary purpose	Exhibition / Performance
Stage configuration options	Adaptable
Seating capacity (including seating capacity in all configurations)	650 flatfloor
Facilities included	All
Year constructed	2002
Significant renovations - year of works and details	2010
Additional amenities in the facility e.g. Bars, dining venues, exhibition space, meeting rooms	Bars, Exhibition spaces, Rehearsal rooms

Source: www.nowbaking.com.au

WACA Stadium

Typical seating and stage layout floorplan

Source: www.austadiums.com.au

515

WACA Stadium

Street Address	WACA grounds, Nelson Crescent
Suburb	East Perth
Best contact person for venue audit	John Soutar, Business Manager
Map Ref	31
Directions 2031 Region	Central
Local Government Authority	City of Perth
Phone number	(8) 9265 7222
Email	functions@waca.com.au
Venue website	http://www.waca.com.au/
Operator and management arrangements	Tickets through Ticketmaster
Funding sources	
Primary purpose	Cricket
Secondary purpose	Events, Concerts
Stage configuration options	Feasible for variety of uses: Sport and Stage with field standing
Seating capacity (including seating capacity in all configurations)	24,500 patrons
Facilities included	Scoreboard and Media Night lighting and indoor Centre Changerooms
Year constructed	1880
Significant renovations - year of works and details	1895 First Grandstand 1931 Farley Stand Demolished 1954 Replacement of scoreboard 1960 Players Pavilion with WACA administration 1970 Additional seating 1984 - 1988 Realignment and resurfacing of ground, construction of new terracing and outer seating. 1986 Six large light towers installed. 2002 Redevelopment - ground capacity reduced and playing arena decreased by 31m and eastern and western boundaries.
Additional amenities in the facility e.g. Bars, dining venues, exhibition space, meeting rooms	Function Facilities, Catering, ATM

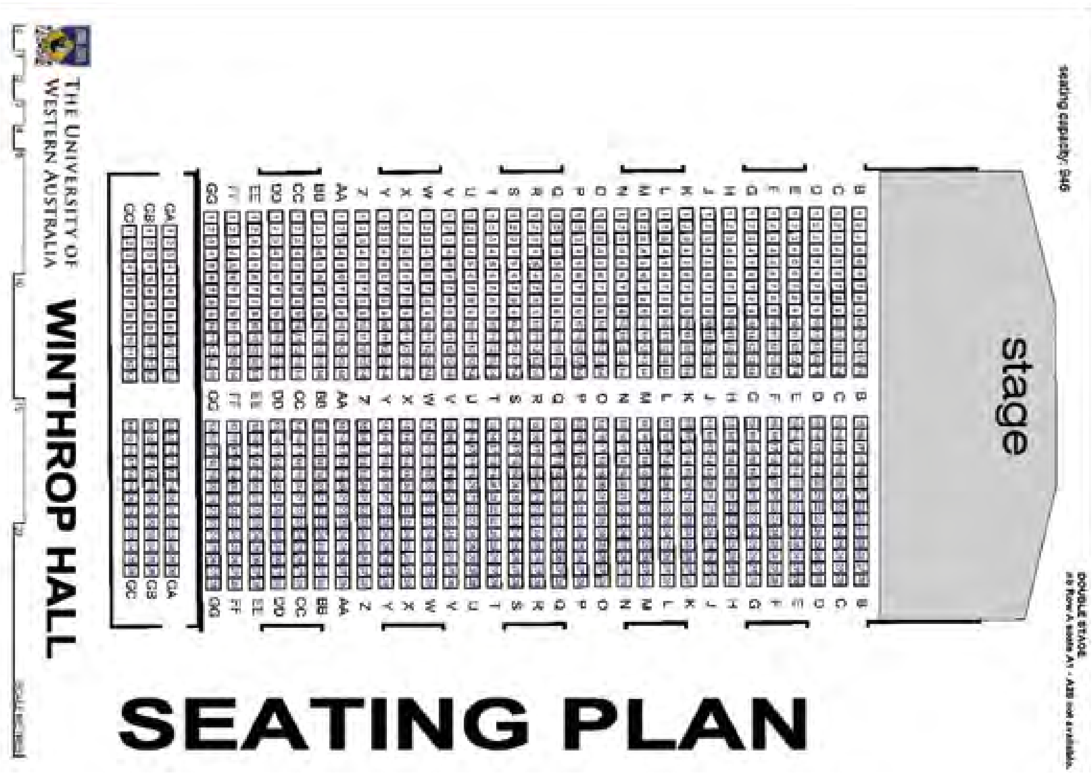
Source: www.gaurdian.co.uk

www.sportskeeda.com

Source: University Theatres

Winthrop Hall, UWA, Crawley

Typical seating and stage layout floorplan



Source: www.theatres.uwa.edu.au