



Campbelltown Performing Arts Centre

Feasibility Study

Report – July 2021

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Acknowledgement of Country

Strategic Solutions Co. recognises Kurna Yerta Meyunna First Nations People and their ancestral lands. The lands were never ceded and remain as important to the living Kurna people today. We respect the living culture, spirit, and country of the First Peoples. We acknowledge and embrace the significance and diversity of First Nations People’s contributions in the greater arts community.

Art is important to all cultures and is particularly important to Aboriginal people as it is through art that Aboriginal people express and explore their Tjukurpa (Law / Dreaming / Stories), song lines and history which have been passed down from their ancestors and are depicted in paintings (including rock art), carvings, weaving, sculptures and ceremonies.¹ Visual and performing arts have been a continuous feature for the World’s oldest living culture and forms part of a tradition which dates back to the earliest examples of Aboriginal Rock art which may be up to 50,000 years old.²



¹ Tjukurpa is a word originating from central Australia but is commonly used. There are other terms used in the over 250 Aboriginal languages which relate to the same or similar concepts.

² Daisey Dumas, “Australian rock art may be among the oldest in the world, according to new research”, *Sydney Morning Herald*, 20 February 2016.

EXECUTIVE SUMMARY

Following the success of recent investments in community sporting facilities, the Campbelltown City Council (CCC) is considering building a new Performing Arts Centre (PAC), including a theatre. Fostering and supporting arts and culture provides activities and entertainment for residents and is an important element of meeting the Council's vision to be a 'safe, sustainable, vibrant Community.' A new PAC could also address the long-standing absence of a town hall to serve as a central reference point for the area and as a central community hub to bring people together.

As well as providing arts and cultural facilities for community members to enjoy as participants and audience members, a PAC could provide spaces to undertake community functions and meetings which align with the CCC mission that "the Community is the centre of everything we do."

As a site has not yet been selected and design work has not commenced, this is not a comprehensive business case which endeavours to compare options and build an accurate understanding of the whole of life costs of this particular PAC by developing a financial model.

The purpose of this Feasibility Study is:

- To test whether there is demand for the proposed PAC in Campbelltown. This is done from a supply perspective and from a potential hirers' perspective. No audience market testing has been undertaken.
- Present an analysis of the potential hirers of the venue and the sort of performances that could be expected.
- Outline the social and economic benefits of the proposed PAC.
- Provide recommendations in regards to the size and style of theatre required.
- Provide indicative capital and operating costs and staffing requirements based on precedent examples.
- Explore operating and governance models.
- Provide advice on next steps to advance the project.

Key findings

1. Investment in a PAC would be consistent with Local Government practice in Australia and would deliver considerable social and economic benefits.

A significant investment in the arts and culture is likely to resonate with many residents because more people in Australia attend art and cultural events than sporting events. Equally, more people participate in arts and cultural events than they do in sport.

Around Australia, councils invest \$752 million annually in recurrent expenditure on arts and culture and many councils own and operate PACs. Many councils see investment in cultural infrastructure as core business because it can provide the following social and economic benefits.

- Artistic and cultural activities provide enjoyment and create vibrancy.
- Partaking in cultural activity as audience members or participants has social and health benefits such as helping to overcome loneliness and growing participants' self-belief.
- For children, the arts are an alternative to sports and have many of the same benefits: activity, comradery, building teamwork and helping to understand others, and for a small number of children a future professional pathway.
- Arts and culture help to foster social cohesion. It brings people together in a common experience and helps to overcome cultural, gender, religious and other divides as it provides

a mechanism through which people can talk to one another across these divides in a 'common language'.

- Cultural infrastructure and the activity it allows also helps to shape how a community sees itself and how it is perceived by others.
- Arts and culture drive economic growth by employing a wide range of people and driving visitation.

A PAC would create economic activity through its direct activities and its ability to draw visitors to the area who would spend additional money at hospitality and tourism venues. It could also act as a stimulator to additional private investment in tourism and hospitality facilities.

The construction of a significant piece of infrastructure would provide an economic impact outlined in the table below.

Economic impact on \$25-30 million construction over two years (SA)		
Output (\$ million)		
\$ 25.00 - 30.00	\$ 47.55 – 57.07	\$ 72.55 – 87.07
Direct contribution	Indirect contribution	Total contribution
Employment (ongoing over two years)		
17 – 20	71 - 85	88 - 105
Direct contribution	Indirect contribution	Total contribution
Value-added (\$ million)		
\$ 5.53 - 6.64	\$ 19.56 - 23.45	\$25.08 - 30.09
Direct contribution	Indirect contribution	Total contribution
<small>These figures are produced using REMPLAN economy. Economic Output is the value of goods and services. Value Added reflects the marginal economic value that is added by tourism related activities, which is estimated by subtracting expenditure on intermediate goods and services from tourism output (gross revenue). The figures have been rounded and may not add up exactly</small>		

2. There would be a high level of demand for a PAC in Campbelltown and it would be well used.

An analysis of existing Adelaide venues demonstrates that there is a shortage of well-equipped theatres of around 300-500 seats. This shortage has been reiterated in a number of surveys and reports commissioned by Arts SA over the last decade and was emphasised by many of the potential hirers consulted as part of this Feasibility Study. This shortage is particularly acute in the East and North-East of Adelaide where existing venues are more likely to be older and larger venues which cater predominately for live music, such as the Norwood Town Hall. A well-equipped, small to medium sized theatre in Campbelltown would have a catchment area from Magill to Salisbury as a more accessible alternative to CBD venues. In the first instance, the venue would meet unmet demand from hirers who struggle to find existing venues. It would also be appealing as an alternative to a number of venues with technical and spatial shortcomings. There would be a high level of demand from a range of hirers including:

- Professional Hirers
- Venue presentations
- Festivals and events
- Community users and hirers
- Community theatre
- Schools
- Dance concerts and competitions
- Children’s arts training
- Visual arts

- Non arts uses such as community meeting rooms

3. A 380 seat theatre would meet local requirements and is the recommended size.
4. A 500 seat theatre is also a viable option and would enable a more exciting and diverse range of performances.

As a very rough rule of thumb theatres come in natural sizes or around 350, 500, 800 and then 1,500-2,000. A large commercial theatre of 1,500 seats is not considered. An 800-seat theatre is not recommended because it is likely to require two tiers of seating (adding considerable capital costs) and is likely to be too large for most local hirers. While the exact size will depend on the site and the configuration of the PAC, the preferred options identified are 380 or 500 seats.

A theatre of under 350 seats is likely to be too small for dance school performances, dance competitions and other children's performances. To meet the needs of these potential full-fee paying hirers whilst still remaining small and intimate enough for smaller performances and meeting the needs of local community hirers, a theatre of around 380 seats is identified as the optimum capacity.

The programming in a 380-seat theatre is more likely to be from community or locally based semi-professional performers because it is too small for many professional hirers. The social and community benefits of the theatre would be primarily realised through community participation on stage as opposed to benefits derived from audience participation.

500 seats is identified as the largest capacity that can be provided in a single tier venue. The larger capacity is more appealing to commercial hirers seeking to maximise revenue through ticket sales. 500 seat theatres, are generally better equipped than smaller theatres to meet the needs of a broader range of hirers. This enables more diverse programming and the social benefits are therefore more likely to be realised through audience participation.

Data on the actual operating costs of Australian PACs indicates a higher annual subsidy will be required to support the activities of a 500-seat venue. Additionally, larger capacity, better equipped venues are more expensive to hire as the venue seeks to recuperate costs through higher fees and the technical staffing requirements drive up costs for hirers. The increased hiring costs will make the venue less appealing to some community hirers, including smaller schools and community groups increasing the risk of theatre underutilisation.

5. A black box theatre is not recommended as it is difficult for non-professional users to use and does not meet the needs of a number of local hirers.
6. A proscenium arch theatre with a mix of retractable and raked fixed seating will provide a traditional theatre experience which is important for many hirers but also provide flexibility for cabaret seating and other uses.
7. Additional spaces, such as a rehearsal room that can also be used as a large dressing or a cheap to hire basic space which might seat 120 people on stackable chairs, as well as additional dressing rooms, meeting rooms, a foyer gallery will be required.
8. In addition to the requirements of the PAC, incorporating additional rehearsal spaces such as one or more dance studios which could be hired by schools and after school hours by dance schools and other children's training providers would help to ensure a mass of activity to keep the PAC well used and vibrant.

The different theatre options as well as advice on likely cost and operating cost and optimum governance are outlined in the table on the next page.

Summary of options based on main theatre size			
	Option 1 – 380 seats	Option 2 – 500 seats	Option 3 - 800 seats
Primary users listed in order of likely usage	<ul style="list-style-type: none"> Community users and hirers Dance concerts and competitions and other children’s arts training Schools Community theatre Festivals Semi-professional use 	<ul style="list-style-type: none"> Community users and hirers Dance concerts and competitions and other children’s arts training Schools Venue presentations Festivals Professional Hire 	<ul style="list-style-type: none"> Professional Hire Venue presentations Festivals Limited Dance concerts Some school use Some community use
Professional use	Local Touring	National Touring	2 nd to CBD
Main community benefit	As performers	As audience	As audience
Social benefits	Medium (More limited range of programming)	High (Wider range of programming)	High (Wider range of programming)
Ability to create landmark	Medium -High	High	Very High
Risk of underutilisation	Low	Medium (Larger theatres are generally better equipped and more expensive to hire ruling out some hirers)	High (Larger theatres are generally better equipped and more expensive to hire ruling out some hirers)
Indicative Capital Cost (based on recent examples)	\$22-25 million	\$25-30 million	\$60 million +
Indicative Annual operating subsidy (ex. Depreciation)	\$250,000	\$750,000	\$1,000,000 +
Best Examples	Marion Cultural Centre	The Art House, Wyong NSW	Cairns or Tamworth
Best governance	Direct Council control	Board Governance answerable to council	Board Governance answerable to council
Recommendation	Recommended option	Viable option subject to capacity/willingness to pay ongoing subsidy.	Not recommended

1. BACKGROUND

Over recent years, Campbelltown City Council has invested in a number of sporting facilities including the \$27.5 million ARC sport and recreation centre, a \$10.5 million upgrade of Campbelltown Memorial Oval at Paradise, and a \$3.5 million upgrade of Daly Oval at Hectorville.³ In addition, currently Council is upgrading Max Amber Sportsfield (\$10 million) and Athelstone Recreation Reserve (\$2.5 million).

The success of these sporting facilities has led the Council to consider ways in which they could be replicated in the cultural space and the possibility of a new PAC is now being examined.

Why the arts and culture?

- In 2018, over 26 million tickets were issued across Australia to live performance events, generating total ticket sales revenue of almost \$2.2 billion -more than the combined attendances at Australian Football, Rugby League, Cricket, Soccer, Basketball, Rugby Union, Tennis, Netball and Baseball.
- In 2017-18, 81.7% of South Australians over 15 and 94.8% of children attended a cultural event or venue defined as galleries, museums, libraries, music and other performing arts shows or cinemas. On the latest data adult attendance at sporting events in SA was 47.6% (2009-10).
- On average, Australians watch 65 hours/month of television, and a further 26 hours of streamed video; of this 10 hours/month is televised sport: Report analysis of ThinkTV (2020), Zenith Media (2020) and Dawson (2017).
- Not only do Australians attend more cultural events than sports events, they are more likely to participate in the arts and culture.
 - 31% of Australians make art
 - 16% participate in community arts activity such as choirs or theatres
 - By comparison, about 28% of the population are involved in organised sporting activities
 - In South Australia, participation in Dance for all children under 15 is second only to swimming in physical activities and well above all sports including Netball, Football, Soccer, Cricket etc.

Live Performance Australia (20-19), Ticket Attendance and Revenue Report 2018, p.1
ABS (2019) Series 41140DO001_201718 Attendance at Selected Cultural Venues and Events, Australia, 2017-18;
ABS (2010) Series 41740DO001_200910 Spectator Attendance at Sporting Events, 2009-10
Daley, J. (2021). Performing arts advocacy in Australia, p.28.
ABS (2015) Series 41770DO001_201314 Participation in Sport and Physical Recreation, Australia, 2013-14:
ABS (2015) (Series) 41770DO001_201314 Involvement in Organised Sport and Physical Activity, Australia, 2013-14
Australia Council of the Arts (August 2020) Creating Our Future: Results of the National Arts Participation Survey
AusPlay survey results (April 2021) January 2020 - December 2020 SA data tables.

Arts and culture is not in direct competition with sport, and in fact most people will attend and/or participate in both. The purpose of these statistics is to help identify that while “Australia’s public

³ Colin James, *Messenger*, July 15, 2019.

culture is overwhelmingly about sport, ... the private lives of Australians are much more about arts and culture.”⁴ An investment in the arts would resonate with residents.

In line with this level of interest, local governments across Australia invest in the arts and culture.

According to research undertaken for the meeting of Cultural Ministers in 2020:

- 564 local government entities across Australia spend an estimated \$752m of annual recurrent expenditure in the cultural sector,
- Local governments own and operate over \$7 billion dollars’ worth of cultural assets and \$3 billion in artistic collections,⁵
- 68% of the venues who are members of the leading performing arts centres network in the country, Performing Arts Connections (PAC) Australia, are owned by local governments. In Victoria, 80% of VPACA members are local government owned.⁶

In South Australia, a significant number of local governments own and operate Performing Arts Centres or town halls which function as performance venues.

Key Finding: Across Australia, Local Government invests heavily in the arts and this investment aligns with the interests of ratepayers.

Campbelltown City Council has commenced the process of exploring the possibility of a new PAC, including a theatre.

In late 2019, a working party consisting of 7 Elected Members and supported by CCC staff was formed to investigate ideas for a suitable PAC. The working party undertook several site visits to look at various size theatres and models, and established a set of desirable elements which include:

- 350 to 500 seat theatre with retractable seating,
- at least one large rehearsal space,
- breakout rooms for hirers and community use,
- a café/restaurant space that would allow users to offer food and beverages,
- a foyer that serves as a usable gallery space,
- adequate on-site car parking,
- suitable for dance concerts, cabarets, performances,
- multi-use and flexible space,
- a small studio for making podcasts,
- includes stage, wings, loading docks, dressing rooms,
- appropriate and ample power sources,
- base technology (e.g. sound and lighting) with capacity for hirers to bring in additional technology,
- ample storage,
- ESD (Environmental Sustainable Design) Principles and a five star Greenstar rating.

The working party resolved to commission a Feasibility Study to test these ideas and ensure that there was sufficient demand from the community and other professional hirers to ensure the best

⁴ Daley, J. (2021). *Performing arts advocacy in Australia*, p.4.

⁵ Meeting of Cultural Ministers FINAL REPORT National Performing Arts Touring Scan (October 2020), p. 29.

⁶ PAC Australia and VPAC websites.

return to rate payers and create a centre which would be active day and night to create a vibrant community heart.

A prudent approach is advised as theatres are expensive to build and maintain and if the wrong sort of venue is built it will be difficult to fill with activity.

Additionally, in order to function to their full capacity, PACs need to engage in activity that can be expensive to host and has limited revenue earning capacity – for example subsidised events such as children’s programming, or large-scale free community events. Understanding the full extent of this likely ongoing cost is essential to enable informed council decision making.

The ongoing challenges of operating suburban performing arts venues in Adelaide are highlighted by the many changes in ownership and operations experienced by the Parks Community Centre and the Hopgood Theatre in Noarlunga.

The Parks Community Centre was opened in 1979 and initially linked to the Parks High School. From its opening up until 1994, it was managed by an independent community board. The Department for Housing and Urban Development then assumed management of the Centre in anticipation of a transfer of ownership of the site to the local council to coincide with the closure of the Park High School in 1996. The school, which had been one of the main users of the venue, closed but the transfer never occurred.

The State Government planned to sell the site in 2010, but following community pressures, a \$28.7 million overhaul and expansion included new community, health and sporting facilities such as a pool was funded in 2013. The operation of the venue was transferred to the YMCA.

The Parks Community Centre two theatres currently have limited levels of utilisation. The programming consists mainly of children’s holiday programs and the occasional local artist matinee performances and some limited community theatre.⁷ The Parks Community Centre demonstrates:

- the challenges in ensuring long term high levels of utilisation,
- the high cost of redevelopment when the facilities age,
- the high level of community attachment to these venues which makes them difficult to transfer or close when they approach their end of usable lifespan.

Similarly, the challenges in running and maintaining the Hopgood Theatre in Noarlunga have seen the theatre change operating models numerous times.

The Noarlunga College Theatre was opened in 1985 as an Arts Training Facility for the Southern TAFE Campus. The training was soon moved to the city and the theatre was leased by Adelaide Theatres, until its return to TAFE management in 2001. The management of the theatre, which was renamed the Hopgood Theatre, was transferred to Country Arts SA under a 10-year operating lease in 2008. Country Arts manage the Hopgood alongside 4 similar sized regional theatres (in Mount Gambier, Renmark, Port Pirie and Whyalla) built by the State Government from the late 70s to early 80s.

⁷ https://www.sa.gov.au/_data/assets/pdf_file/0017/113552/Parks_Community_Centre_-_A_Practical_Approach_for_the_Future.pdf

<https://www.adelaidenow.com.au/messenger/west-beaches/parks-community-centre-pool-opens-as-part-of-241m-overhaul-of-angle-park-site/news-story/823e3555d09b91374ec364ba4500473c>

<https://www.parksrsc.ymca.org.au/theatre/about>
ORSR - The Parks Recreation & Sports Centre

The Hopgood is a highly valued community asset but since the ten year lease to Country Arts SA expired in 2018, it has survived on yearly State Government funding to keep the theatre open as the Government continue negotiations with the City of Onkaparinga over the transfer of the asset and its operations.

As the operations of the Hopgood are integrated into the Country Arts network, it is difficult to extract exact operating costs. However, it was reported in 2018 that the venue costs about \$200,000 a year to run and the Onkaparinga council has estimated that it requires \$5 million in upgrades. The upgrade of the theatre is being considered as part of the \$22 million vision to transfer the area for which the Onkaparinga Council is seeking state and federal funding.⁸

The Parks Community Centre and the Hopgood Theatre demonstrate some of the risks associated with running performing arts venues. The Campbelltown City Council would be exposed to these risks without undertaking due diligence in fully investigating the case before proceeding.

Key Finding: Performing Arts Centres are expensive to build and operate successfully and a cautious approach is advised.

This Report is broken down into the following sections:

- **Demand analysis** which tests the potential demand on the proposed PAC by undertaking a gap analysis on existing venues in Adelaide and a demand analysis based on consultations with potential hirers and other venues as well as a local hirers survey.
- **Social and economic benefits** which undertakes a qualitative assessment of the benefits and a quantitative assessment of economic impact of construction.
- **Size and style of the theatre** which provides advice on the most suitable size and some guidance on theatre features and style which is based on the needs of potential hirers.
- **Potential capital costs** based on precedent models.
- **Operating models and governance options.**
- **Potential operating costs** derived from precedent examples.
- **Next Steps** outlining some of the next steps that will progress the project.

⁸ <https://www.adelaidenow.com.au/messenger/south/funding-secured-to-keep-hopgood-theatre-curtains-open-for-12-months-longterm-future-remains-unclear/news-story/112edc77fc62a05e0fe14e492e66e06d>
<https://www.onkaparingacity.com/Council/Media/hopgood-update-august>

2. DEMAND ANALYSIS

This section of the Feasibility Study sets out to determine whether a PAC in Campbelltown would be sufficiently utilised to warrant the rate-payers' investment in its construction and operation.

This is done by undertaking a gap analysis of venues in Adelaide and in the East/North-East area to identify any gaps in the venue market. Secondly, a demand analysis outlines who the likely users of the venue might be. This was done by undertaking consultations with other venue operators and a range of potential users. Interviews were supplemented by two community engagement sessions hosted at the Campbelltown Council chambers and attended by 35 people and a survey filled out by 24 respondents. There is a short section on audience demand based on national and state data. No localised user demand from an audience perspective has been undertaken.

Gap analysis

This section will examine market gaps in the provision of venues both across metropolitan Adelaide and in the east and north-east of Adelaide.

An analysis of venues across Adelaide shows that whilst on the surface there are many theatres in Adelaide, many are poorly equipped or are mainly used as music venues and are not suitable for a broad range of theatrical performances. There are not many well equipped small to mid-size theatres of between 300-500 seats and the Dunstan Playhouse is the only fully-equipped 800 seat theatrical venue in Metropolitan Adelaide.

Theatrical terms	
Black Box	A plain black theatre with no fixed stage position
Proscenium Arch	A proscenium arch theatre has a fixed stage and an architectural frame, known as the proscenium arch which demarcates the stage from the audience
Tier	Levels of seating. A two-tier theatre has a ground level of seating (stalls) and a balcony
Fly system	Lines used to "fly" material such as sets on and off stage
Raked seating or stage	On an incline
Show / Performance	By way of explanation a community theatre group might mount a show, such as Mamma Mia which might have 8 performances over two weeks.

Standard	Description
Professional	Fully equipped venue for professional use
Good	High standard but lacking in some amenity or not the latest technical equipment
Average	Well-kept older venue with reasonable technical equipment
Basic	Basic staging, seating and tech for very basic usage
Poor	Basic amenity and tech in poor condition

Main Theatres in Adelaide by region

CBD			
Venue	Seats	Facilities	Condition and usage
Adelaide Festival Theatre (AFC)	2,000	Fully equipped theatre	Professional standard All performances
Dunstan Playhouse (AFC)	800	Fully equipped drama theatre	Professional standard Drama, dance, music, comedy, children's programming
Space Theatre (AFC)	390	Black Box Theatre	Professional standard Black Box Children's theatre, drama, music
Her Majesty's Theatre	1,500	Fully equipped theatre	Professional standard All performances
Adelaide Town Hall - Auditorium	1100	Concert Style 2 tier music venue	Professional standard Music (Classical)
Elder Hall	660	Concert Hall	Good standard Music
The Royalty Theatre	620	Proscenium Arch 2 tier Problematic stage rake	Average standard Callisthenics/Theatre/Comedy
The Scott Theatre	560	Lecture & Theatre 2 tier	Good/Average standard Very limited availability for non-university use
The Arts Theatre	492	Basic theatre with orchestra pit	Average standard Amateur Theatre
AC Arts Main Theatre	220	End On Raked Balcony Seating	Good standard Dance theatre, comedy
AC Arts X-space	120	Black Box	Good standard Dance, Theatre Comedy
The Little Theatre	120	Horseshoe raked fixed seating. Small capacity	Average/Basic standard Theatre
Bakehouse Theatre	98	Small end on moveable seating rake + a smaller 40 seat flexible space.	Average/Basic standard Theatre (Closed as of 7/7/21)
EAST			
Paradise Influencers' Church	3,000	A technically well-equipped church auditorium. No fly, no wings, may be too large to offer theatrical intimacy	Good standard Church services
Norwood Concert Hall	800	Simple manual fly system Flat ground floor Balcony	Professional standard for music Music concerts, functions and expos, cabaret acts, dinner dances, comedy, children's shows.
Regal Theatre	500	A cinema with an occasional live program music	Basic standard for performing arts Occasional Music Venue
Burnside Town Hall	500	Hall for hire - bare walls.	Basic Empty hall for hire Private Functions

St Ignatius College	350	High level of tech, retractable seating. Limited height and wing space. No fly	Good standard Predominately school usage
Burnside Ballroom	195	No fly, no fixed seating	Basic Empty hall for hire Private functions
Odeon Theatre	221	Raked seating bank, end on, stage at floor level	Average standard Home of Australian Dance Theatre plus smaller Dance Studio
NORTH			
Golden Grove Arts Centre	377	Proscenium Arch, Tiered retractable seating flat floor seating 400 people. Foyer / gallery – seating 150 people	Good standard Predominately school usage. Dance comps on weekends and monthly matinees
Shedley Theatre	387	Proscenium Arch, Tiered fixed seating, large stage	Good standard School usage, matinees, music, community theatre
The Parks Theatre 1	133-200	Horse shoe Seating fixed, thrust stage	Good standard Underutilised
The Parks Theatre 2	166-180	Proscenium Arch, end on, raked fixed seating	Good standard Underutilised
WEST			
Adelaide Entertainment Centre - Black Box Theatre	3,000	No fly	Professional standard Music, comedy, events
Thebarton Theatre	2,500	No fly - Proscenium Arch, 2 tier, ground floor seating flexible	Professional/Good standard
Woodville Town Hall	870	Proscenium Arch, no fly system 2 Tier flexible floor pan	Professional/Good standard
Star Theatre - Theatre One	350 72	Two theatres Theatre 1 end On floor rake & 1 tier	Basic standard Community theatre
Holden Street Theatres Arch Studio	130 150	The Arch is a basically equipped Thrust stage proscenium theatre and the Studio is a black box theatre	Good standard Theatre, dance, music
SOUTH			
The Goodwood Institute	215	A 215-seat, a sound and lighting control room, orchestra pit with serviced piano, large dressing room, raised 10 x 11m stage	Basic standard Music, cabaret and some theatre.
Hopgood Theatre	492	492 proscenium arch theatre, 29 Counter-weight fly lines	Average standard Well-equipped but dated.
Marion Cultural Centre	300	No fly Limited wing space Raised or flat stage Acoustic Treatment	Good standard Strong program of local activity.
Brighton PAC - Theatre	330	Black Box - lighting rig (sound + lights)	Good standard Managed by High School

Brighton PAC - Concert Hall	400	High standard concert hall	Good standard Managed by High School
Hills and Inner - Regional			
Ukaria Cultural Centre	220	Specialist chamber music venue	Professional standard
Stirling Community Theatre	200	Raked seating with dressing room, backstage area, foyer and meeting room.	Average standard
Barossa Cultural Centre	965	Two tier proscenium arch theatre equipped with fly system	Professional standard Mainly music, magic, comedy, children's programming
This list is not comprehensive but includes most of the theatres that would be operating in a similar space to the proposed Campbelltown PAC. A number of theatres in state schools and in private colleges have not been included because they generally have limited availability for external hirers.			

The most comprehensive survey of performing arts spaces in Adelaide was the *Theatre Spaces and Venues Audit* commissioned by Arts SA and undertaken by Elizabeth Raupach in 2010, a copy of which was provided by Arts SA to assist with this Feasibility Study. The key finding of the Raupach Report was that there was a lack of suitable spaces to host international artists during the Adelaide Festival and Fringe periods and equally a lack of suitable and affordable venues in Adelaide for the local theatre community to make and present work.⁹ Whilst the report is somewhat dated, the findings are still very relevant because the situation has not improved.

Raupach found many of "South Australia's venues [are] inadequate, outdated, run down and past their prime. ... [There is a] lack of rehearsal space; outdated technical equipment, inadequate disabled access and a lack of ongoing maintenance funds." The report goes on to note that, "most theatres needed an upgrade of equipment and facilities, many theatres have significant Work Health Safety (WHS) and access problems."¹⁰

Theatres needing upgrades include the Arts Theatre and The Royalty which are older style proscenium arts theatres located on Angas Street Adelaide. While both have high usage from their main audiences – calisthenics at the Royalty and community theatre at the Arts – the facilities are poor with outdated staging, seating, back stage and technical facilities. The Royalty suffers from a small stage and a problematic stage rake, as reported by Raupach and re-iterated in the community consultations done for this study.

In recent years, Her Majesty's Theatre and the venues at the Adelaide Festival Centre have been upgraded but this does not solve venue availability for hirers, particularly those requiring more affordable options. The Entertainment Centre has built a new black box theatre but this is primarily used by commercial music presenters.

The Queens Theatre is undergoing refurbishment from a dirt floored indoor carpark into a small multi use flexible theatrical space and the Woodville Town Hall was recently refurbished and has a small proscenium arched stage, fixed balcony seating and a flexible floor plan for seating.

⁹ Raupach, E., (2010) *Theatre Spaces and Venues Audit*, p.1, p.9

¹⁰ Raupach, E., p.26

However, these upgrades are more than offset by the closure of several important theatre spaces including The Union Hall and the Madley Dance Space at the University of Adelaide as well as The Lion Arts Centre, and The Price Theatre. In addition, other theatres have become less available. Theatre groups consulted with as part of this study claimed the Little Theatre at Adelaide University is now mainly used by the Theatre Guild and the Scott Theatre is mainly used as a lecture theatre with some short windows of opportunities for hirers in term breaks.

The findings of the Raupach report have more recently being re-iterated in the 2019 Arts Review commissioned by Arts SA confirmed the ongoing concern amongst artists about the lack of venues for performances and rehearsals. The responses to the question ‘My organisation has adequate infrastructure (rehearsal/performance/office space) to deliver its artforms’ gave the following response.¹¹

Strongly Disagree	Disagree	Neither	Agree	Strongly agree	Can't say/not applicable	Total	Weighted Average
21.81%	30.32%	12.77%	22.87%	6.91%	5.32%	188	2.6
41	57	24	43	13	10		

Current surveying (2021) undertaken by Arts SA and made available for this Feasibility Study further highlights the lack of suitable venues across metropolitan Adelaide. A survey of 31 performing arts organisations were asked to identify existing venue gaps in Adelaide with 61% seeking creative development space, 78% needing space to rehearse and 84% of companies looking for suitable venues to mount performances.¹²

There is a clearly demonstrated shortage of theatre venues in the Adelaide metropolitan area. Campbelltown is central enough to be an attractive potential venue for a range of performers, producers and organisations who might otherwise consider CBD venues.

Key Finding: There is an identified lack of multi-purpose, readily available theatrical venues in metropolitan Adelaide as has been re-iterated in numerous surveys and studies commissioned by Arts SA over the last 12 years. The shortage of venues has led to unmet demand which the proposed PAC in Campbelltown can fill.

Gaps in East and North-East

There is a shortage of theatrical venues In the East and North East. There are a number of larger halls that are best suited to music but these are limited in their capacity to host other events.

- **The Norwood Concert Hall** is a large venue with a balcony and no raked or fixed seating on the stalls (ground level). It can hold up to 800 people but has limited technical equipment and theatrical capacity. It is predominantly a music venue.
- **The Burnside Town Hall and Ballroom** both host performances with a flexible seating plan with no fixed seating. They are essentially bare halls for hire and are mostly used for music and cabaret performances or private functions.
- **The Regal** is a movie theatre that occasionally also hosts live music events.

¹¹ The Arts Review for South Australia, July 2019 Consultants’ Report, p.15

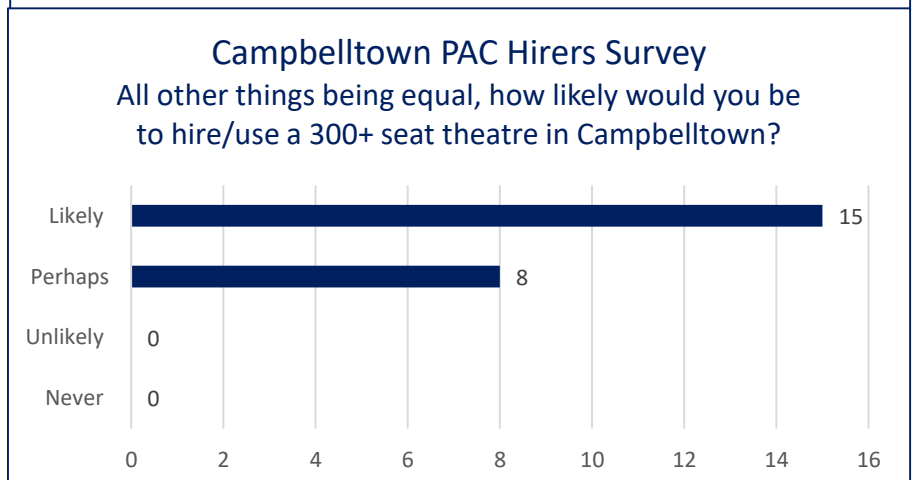
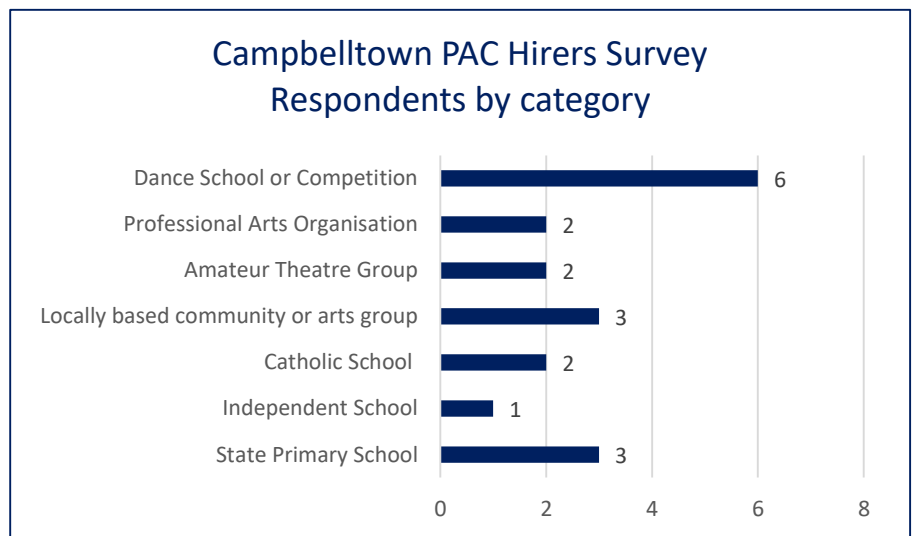
¹² Arts SA, Arts Plan Venue needs and barriers research – internal document shared with Strategic Solutions Co.

- **The Golden Grove Arts and Recreation Centre** is predominantly used as a school venue with some limited local programming and predominately dance school and competitions hires on the weekends.
- **The Paradise Influencers Church** is a huge auditorium of up to 3,000 stackable chairs. It is well equipped technically but does not have any built-in wing space or the theatrical intimacy. The Church is endeavouring to hire the venue for non-religious uses and the Adelaide Youth Theatre recently performed in the venue. However, it is far too big for most potential users of a theatre in the Campbelltown area and the fact that is an active Church may dissuade some commercial and community user from hiring it.

Theatres which would be competing for hirers with a venue at Campbelltown	
Competitive Venue	The competitive advantages of the proposed Campbelltown venue
Space Theatre (AFC)	Cost advantage for hirers
The Royalty Theatre	Better condition – easier access and parking
The Arts Theatre	Better condition – easier access and parking
The Scott Theatre	Greater availability for hirers
Norwood Concert Hall	Smaller, more intimate and better equipped venue. Cost advantage for hirers
St Ignatius College Theatre	Greater availability for hirers
Burnside venues (Town Hall, Regal, Ballroom)	Better equipped venue which can be hired without needing to provide equipment.
Golden Grove	Greater availability for hirers
Influencers Church	More appropriate size, no association with Church

The proposed venue in Campbelltown would appeal to a number of hirers seeking audiences wanting to avoid the difficulties, such as travel and parking, associated with CBD venues

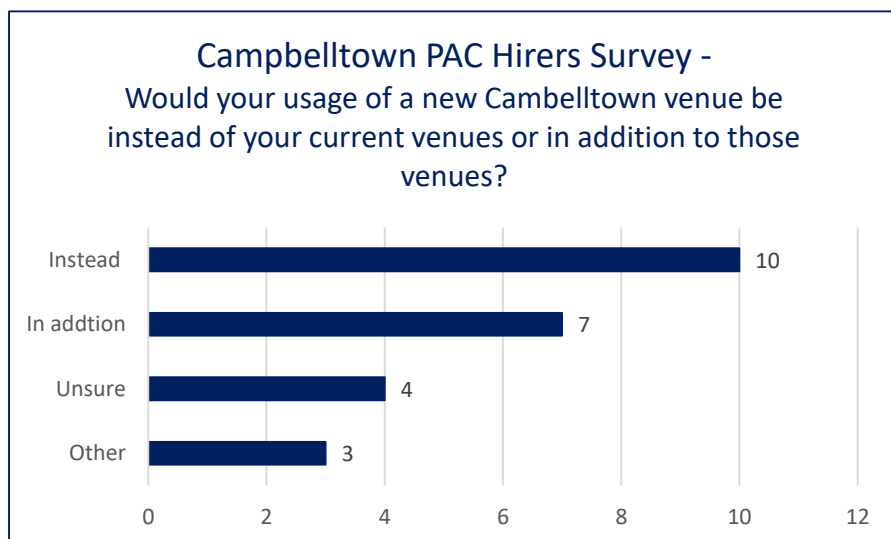
As part of this study, two community information sessions were held at the Campbelltown Council Chambers with 35 participants. Additionally, a survey of 24 potential local hirers including schools, dance schools, community groups, community theatre and other potential hirers largely based in the Campbelltown Area was conducted.



The survey respondents demonstrated a strong appetite to hire the venue.

Many survey respondents indicated they would use the venue instead of their current venues. (Other indicated that it would be price dependent)

Key Finding: The East and North East does not have many multi-purpose, readily available theatrical venues. There would be a high level of demand for the proposed venue in Campbelltown. The audience catchment for a Campbelltown PAC is potentially in a line from Magill (along Portrush Road) to Salisbury.



Hirer Demand Analysis

Whilst there is a supply side shortage for venues, it is also important to test the demand side to confirm the shortage and ensure it is not a temporary issue.

Through the consultations and the survey, the following potential hirers were identified:

- Professional Hirers (Commercial and publicly funded arts organisations)
- Venue presentations
- Festivals
- Events
- Community users and hirers
- Community theatre
- Schools
- Dance concerts and competitions and other children's arts training
- Visual arts
- Non art uses - meetings and conferences and other alternative uses.

Following consultations with these potential hirers and based on an analysis of usage with other suburban venues in Adelaide, we produced a program of likely usage for the proposed Campbelltown PAC. This program is presented at the conclusion of this section, but finds that the proposed PAC would comfortably meet recommended utilisation targets.

Professional Hirers

Professional hirers of a suburban performing arts venue would either be commercial presenters seeking to make a profit or publicly funded professional arts organisations who balance revenue needs with public purpose obligations.

❖ *Commercial producers*

Commercial producers will generally favour larger venues to maximise ticket sales. Commercial producers are most likely to seek to present artists as part of an international or national tour. There

is also a local touring network comprising mainly of South Australian artists who play predominately in South Australia.

A venue in Campbelltown is unlikely to compete with CBD venues for international touring performers regardless of the size of the venue. If the venue was large enough, it might be used as 'second choice' to the CBD venue if there were availability issues or the venue hire fees were very favourable to the hirer.

A venue in Campbelltown is more likely to work with producers who are looking to tour shows through regional Australia. The category of show is very likely to depend on the size of the venue. A following section of this report examines what the implications of targeting professional or community hirers will have on the sort of venue the council will favour and the sort of program it would then attract. A smaller venue is more likely to appeal to Adelaide based artists and a larger venue will attract more national artists likely to be live music, comedy, small scale musical theatre, commercial children's theatre. The type of show might be "Bluey" or the "Soweto Choir".

Local touring networks might include a presenter such as "Take a Spin Roulette Shows" which program the Regal Theatre in Burnside Council where the occasional live shows supplement the regular theatre program and will include 7 performances between June and September 2021 including:

- 4 Jun Rachael Beck – This Girl
- 5 Jun Rachael Beck – This Girl (Matinee)
- 5 Jun Hello – Erin Jae Sings The Songs Of Adele
- 17 Jul Rhonda Burchmore & Lara Mulcahy Are Abba-Solutely Fabulous
- 18 Jul Rhonda Burchmore & Lara Mulcahy Are Abba-Solutely Fabulous
- 4 Sep Carlotta – The Party's Over (Matinee)
- 4Sep Carlotta – The Party's Over

IN addition to the sort of music shows presented at the Regal, other commercial programming at the proposed PAC is likely to be variety shows, tributes, cabaret, comedy and speaking tours.

These shows can either be put on as straight venue hirers with no risk to the venue or through shared risk/profit arrangements. We have assumed there would be 18 commercial performances a year.

❖ *Publicly funded professional hires*

The other category of professional hirers are the arts organisations publicly funded through the Australian Council of the Arts or the South Australian Government. The major national public companies, Opera Australia or Ballet Australia are unlikely to use a suburban venue so close to the CBD. However, the locally based, publicly funded companies do have outreach programs and do at times seek cheaper venues than the CBD venues. These companies include Windmill, Patch, Slingsby, Brink, Australian Dance Theatre, Restless Dance Theatre, State Opera of SA, Adelaide Symphony Orchestra and the State Theatre Company of SA.

Based on consultations with other council performing arts venues, this usage is likely to be limited to 5 shows a year with maybe 10 performances a year.

❖ *Venue presentations*

The venue itself can act as a presenter. Often venues will present commercial work in order to raise revenue to support public purpose programming. Successful presentations that return box office revenue to the presenting budget will allow for more public purpose presentations.

In Adelaide, the Shedley, Marion Cultural Centre and the Hopgood present a range of commercial shows with the intent of turning a profit – these are often music shows such as tribute bands. We have assumed 20 such shows in the program.

There is also a local government shared touring network Out of the Square (OOTS) which brings together suburban arts centres that plan, package, programme and present arts and entertainment outside Adelaide's CBD. The members are City of Tea Tree Gully, City of Playford, City of Marion, City of Onkaparinga, Rural City of Murray Bridge, The Parks Community Theatre, City of Prospect, Alexandrina Council and presenting partner All Sorts of Entertainment. OOTS provides 11 matinee music shows and often has school holiday programs which target Out of School Care programs and the general public. Joining the OOTS program would be an obvious step for the Campbelltown venue to take. We have assumed 4 evenings and 6 matinees of OOTS venue presentations across the year. We have also assumed 10 school holiday performances and 10 school holiday workshops annually.

Commercial venue presentations can also be sourced from show cases as the South Australian Presenters Association annual show case or The Australian Performing Arts Market which also holds an annual showcase in Adelaide where artists present their shows to potential buyers. Again, the venue could collaborate with other venues and enter into a range of full-risk or shared risk arrangements with artists and other presenters.

❖ *Festivals*

According to Live Performance Australia, *Ticket Attendance and Revenue Report 2018*, Festivals are one of the fastest growing sections of the performing arts market. This is particularly true in South Australia which has the highest rate of Festival attendance in Australia.

It is possible a new venue in Campbelltown could attract 20-30 day/nights of Festival and cultural event performances across a year. We have assumed 20 events in the Adelaide Fringe (refer Open Access Festivals below), 10 commercial hires and 10 programmed.

There are effectively two types of Festivals – curated festivals and open access festivals.

❖ *Curated Festivals*

These include the Adelaide Festival, WOMAdelaide, Writers' Week, Adelaide Cabaret Festival, dreamBIG (children's Festival), Adelaide Guitar festival, OzAsia, Adelaide Film Festival, Illuminate Adelaide, Tasting Australia, and whilst not strictly a Festival – the Tour Down Under.

Curated festivals are actively programmed by an Artistic Director or Producer. The shows are selected and predominantly paid for by the presenting organisation which pays all the fees, travel and accommodation costs, venue presenting costs, theatre hire, technical equipment and staff, Front of House and marketing. In return the festival takes all of the box office less any applicable royalties and any ticketing costs to third party ticketing providers. In order for festival presentations to be performed at the proposed Campbelltown PAC, several different models in terms of venue hire or profit share or incentives to the festival organiser would be possible and would need to be negotiated with the festival organiser.

A venue wishing to present in a curated festival must negotiate their participation in a festival. The festival and the presenter would then negotiate the program and presenting arrangements.

Based on past programs, it is unlikely but not impossible that the Adelaide Festival, Womadelaide, and Writers' Week would choose to present in a suburban PAC.

However, the festivals presented by the Adelaide Festival Centre, which include the Adelaide Cabaret Festival, dreamBIG (children's Festival), Adelaide Guitar Festival and OzAsia, frequently use external venues and often have active outreach programs. In consultation, the CEO and Artistic Director of the Adelaide Festival Centre confirmed these Festivals would, in the right circumstances, be open to using a venue in Campbelltown. It might also be possible to attract Illuminate Adelaide or Tasting Australia out-reach programs in the future. We have assumed a further 10 programmed events from participation in Adelaide's various festivals across the year.

❖ *Open Access Festivals*

Adelaide Fringe Festival, SA History, FEAST Festival, SALA Festival, Cabaret Fringe Festival, Adelaide Food Fringe and cultural and religious events are all generally opens access festivals meaning that anyone can register an event or as a venue.

Regional and suburban venues which nominate as fringe venues are not provided artists or programs and must book their own. This can be done either through ticket sales sharing arrangements or through direct fee paid by the presenting venue to the artist with the venue taking the risk on ticket sales and other revenue. Programming a venue for the Fringe requires expertise.

The Marion Cultural Centre programs its venue over Fringe. In the past, Charles Sturt Council has engaged Martha Lott (Holden St Theatres) to program the Woodville Town Hall. The "big name" Fringe style performers are unlikely to favour a suburban venue over a CBD venue, particularly since the advent of large scale, temporary outdoor venues in places like The Garden of Unearthly Delights and Gluttony. However, the Marion Cultural Centre's Fringe program of 2021 of over 20 shows and 40 performances demonstrates it is possible to curate a program that's unique and favourable to a particular venue and audience. Having an outdoor space would allow for larger shows, and a weekend of Fringe type events with food and beverages and children's activities.

In addition, there are a large number of cultural and religious festivals and events over the course of the year. A new venue might attract some existing events to its venue from other venues, it might host out-reach programs, or it might undertake its own programming or events to celebrate these days, promoting cultural harmony and drawing new audiences to the venue. These events include days or weeks like Chinese New Year, Indian Diwali Festival (of lights), Ramadan Feast of 'Eid, Italian and Greek Festivals as well as other culturally based Festivals, Holi Festival of Colour, Harmony week, National Reconciliation week, Nowruz, Easter, Al Hijra.

For a comprehensive list see: [Calendar of cultural and religious dates \(harmony.gov.au\)](https://www.harmony.gov.au/calendar).

By and large participation in festivals is unlikely to be a net revenue raiser. This is particularly true for curated festivals. Programming a fringe calendar might be profitable but would also carry considerable risk. This might be minimised by entering into ticket sales sharing arrangements with artists rather than a more traditional arrangement. Cultural and religious festivals are not-for-profit events.

It's advantageous to be part of a highly recognised Festival, drawing PR attention, new audiences, brand awareness, that supports generating new and repeat business for both hirers and audiences.

Partaking in cultural and religious festivals either simply as a hired venue, or actively programming and hosting these, is an important part of cultural outreach and helps to foster social cohesion by demystifying difference and encouraging cross cultural activity. These events are also important to build awareness of the venue to potential new patrons.

❖ *Events*

Similar to festivals, there has been a global trend towards events which are often integrated with performing arts festivals. These are often large scale and can be based outdoors to increase capacity. Events are an important part of growing the profile of a PAC and increasing audience numbers. Ideally, the Campbelltown PAC would have an outdoor area that can be used as an event space, possibly in conjunction with the foyer and facilities of the PAC. Possible events include:

- Winter activations – ice rinks/themed villages
- Light festivals – light installations/projections onto buildings/landscapes
- Multicultural food night markets ‘noodle markets’
- Niche/themed food events i.e. the Campbelltown Pizza Festival, seafood (squid), winter reds, beer and bbq, chilli, dessert, cocktails, vegan
- Focus on wellness – health, fitness, mental well-being or other outdoor events and activities such as trail running/hiking/biking events – more connection with nature
- Purpose – socially responsible, social or environmental statement, reduced carbon footprint
- Instagrammable events – themed, interactive experiences¹³

Key Findings:

- A range of professional hirers are likely to find a theatre in Campbelltown an appealing venue to hire. The nature of the shows will depend on the size of the theatre.
- Festivals and Events are growing market segments. They are also important vehicles to promote the PAC and draw in new audiences.

Community users and hirers

The section above covers the utilisation of the theatre when the performers on stage are professional performers, with the exception of the open access festivals which are often semi-professional or non-professional performers.

Community users and hirers, that is to say people hiring the performance space to put on shows where those on stage are non-professional, are likely to be the majority hirers. The PAC Australia (2020) 2019 Economic Activity Report – Performing Arts Connections Australia, survey of members found 48% of shows were community and 52% professional. The percentage of community usage is likely to be higher in a smaller council run venues. In fact, the two SA respondents to the survey reported that it was 63.4% community usage and only 36.6% professional performances.

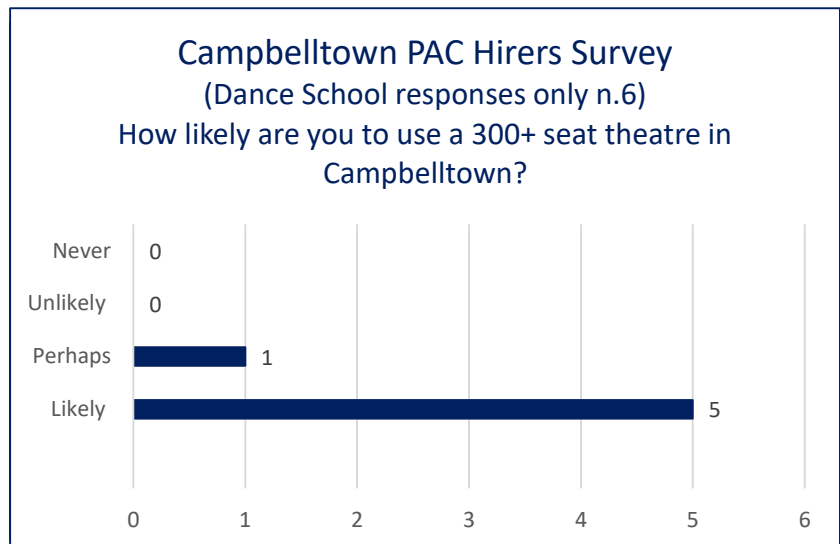
❖ *Dance concerts and competitions and other children’s arts training*

Dance school and calisthenics hirers are a very important component of all the suburban and regional venues which were consulted for this study. Australia wide 302,100 adults and 425,100 children

¹³ City of Busselton DRAFT Busselton Performing, Arts and Convention CentreBPACC Business Plan 2020-2025 Version 5, pp.8-9.

participate in recreational dance. Recreational dance is second only to swimming in South Australia by organised activity for children between 0-14. Gymnastics is third. This is not a new or short-term trend. Dance participation numbers across Australia show that Dance participation has declined 0.3% between 2001 and 2020. Fitness/Gym, walking running, yoga and cycling have increased and golf and tennis have decreased.¹⁴ Full figures are in appendix 1.

Dance schools and dance competitions and calisthenics organisations will be an important full fee-paying hirer of the proposed Campbelltown PAC which would be used for end of year and mid-year concerts and for and for dance competitions. The local dance schools surveyed indicated a high level of interest in the venue with 5 of the 6 dance school operators indicating they would be likely to use the venue with four indicating it would be between 6 and ten times a year.



There would also be additional demand from dance competitions, including both those which are locally based and nationally based competitions which tour. Dance competitions are one of the main week-end hirers at the Golden Grove Arts Centre.

We have assumed 40 days of use of the main theatre per year by dance related activities and consider this to be a conservative estimate.

In addition to hiring the main stage for concerts and competitions, there is also likely to be considerable demand from dance schools and other children’s training programs for hiring spaces to hold regular lessons. It is difficult to incorporate fixed regular usage into a PAC because it can interfere with the needs of other hirers. For example, a dance school cannot hold regular lessons in the rehearsal studio every Thursday between 5-8 pm because a main stage hirer might need that space for rehearsals or as a back stage area needed for their performance. This could be overcome by incorporating independent facilities for hire either within or adjacent to the PAC. The concept of building in separate spaces for hire, such as one or more dance studios, is explored in detail in section 4 of this report. The idea is that these spaces would operate independently and on a financially viable basis but the use of those spaces would help to create the mass of activity required for the PAC to be vibrant and busy year-round.

❖ **Community theatre**

Community theatre was once more widely known as amateur theatre because it is run on a largely or entirely volunteer basis. There has been a move away from term amateur theatre because it suggests a lower quality product. There are many types of community theatre, from youth theatre groups, like

¹⁴ Ausplay data “Participation trends in Australia” slide 8

the Adelaide Youth Theatre, to long standing amateur groups who mount productions ranging from comedy to drama to musicals.

Consistent with trends across the performing arts, community theatre productions of musicals tend to sell the most tickets and sometimes generate enough ticket sales in Adelaide to present a show, such as Mamma Mia or Mary Poppins with 8 performances at 300-500 seat venues. Some of these shows are of quite a high standard and appealing to audiences because the tickets are in the \$20-40 range as opposed to \$80- 150+ for a professional performance.

A number of community theatre groups have expressed a direct interest in the proposed Campbelltown PAC. This includes the Marie Clark Musical Theatre Company (based in Tea Tree Gully), the Adelaide Youth Theatre, The Metropolitan Musical Theatre (based in Maylands) and the newly formed Campbelltown Players.

A lot of community theatre currently plays in the Arts Theatre in the CBD. This venue is heavily booked, particularly since other relatively large and cheap to hire venues have become unavailable such as the Union Theatre which was demolished and Scott Theatre which is now predominately used as a lecture theatre both on the Adelaide University campus.

Having a community theatre company access the theatre once or twice a year for a 1–2-week season could form an important anchor point for the performance space usage as well as programming. The community benefit would be even higher if the performers were local ratepayers. Our program has allowed for four weeks community theatre over the year.

Some caution does need to be applied to community theatre. As one venue operator put it during the consultations, “they want the venue for free and they want the keys to the front door.” The free part is an overstatement but community theatre operators do often want discounted rates, they want to use their own technical staff (which depending on the level of equipment is not always possible) and they want to take over the venue for a one or two week season which does inevitably increase the number of dark days. For example, a hire might be on a Sunday to Saturday basis or start on a Tuesday where the company bumps in and sets up their set and then rehearses on the Wednesday with performances on Thursday, Friday and Saturday nights, with a potential matinee on Saturday and Sunday. If it is a two week season, the stage will generally remain set and the theatre dark on the Monday to Wednesday followed by Thursday to Saturday or Sunday performances. As the stage is set, it by and large precludes other users on the off-performance days.

❖ *Schools*

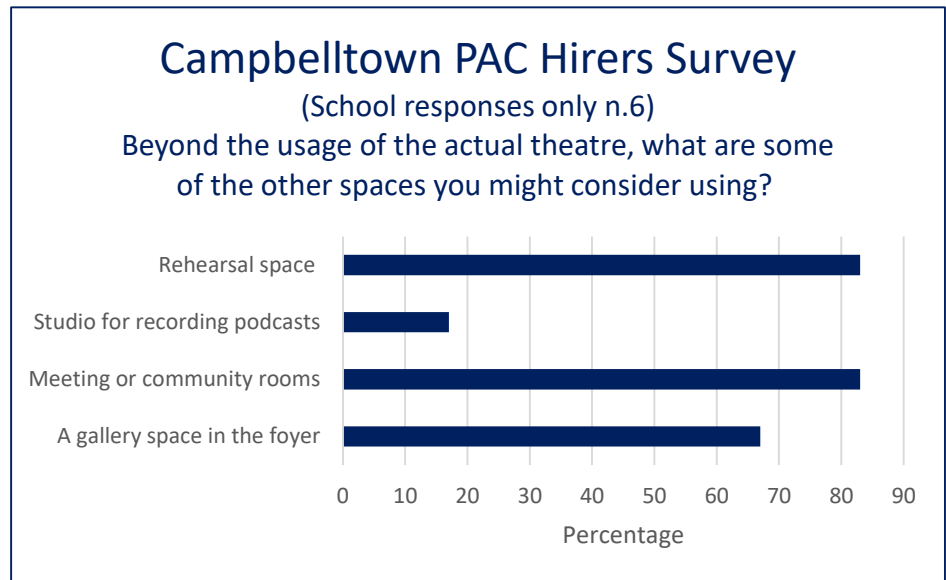
Local schools, and also schools outside of the area are likely to be high users of the venue for end of year concerts, other performance nights, award ceremonies and possibly graduations. The possibility of a joint venture with a school is covered elsewhere but this section is assuming school usage through hiring arrangements.

For end of year concerts schools need plenty of space backstage for the performers, in this case all the school students. Schools sometimes also consider that 4 seats in the auditorium per student are required. However, the large-scale performances are really only the end of year concerts, which are one-offs and are seasonal. Even end of year concerts can be undertaken over several nights.

The bulk of school usage is for smaller performances, such as drama class show or music concerts and graduation ceremonies. The Hopgood and the Shedley report between 30-50 school performances a year, while the Golden Grove Arts Centre had 200 four-hour school sessions as part of joint usage agreement. We have assumed 40 days combined usage. This is not including any hire arrangements with schools to use the facilities for the delivery of the school curriculum.

Schools also like smaller spaces which are inexpensive and easy to use for performing arts classes and may make use of a rehearsal space for classes as well as needing

local meeting rooms and places for other events such as school exhibitions.



Visual arts

The Campbelltown PAC working group identified the need to incorporate a gallery space into the foyer. Many performing arts centres do this as it provides a venue for the visual arts and is a way to increase attendance in between on-stage performances. Visual art exhibitions could include:

- SALA
- The exhibitions of the Art House
- The Campbelltown Art Exhibition
- Touring Exhibitions.

The National Exhibitions Touring Support (NETS) Australia is the national network supported by State and Federal Governments committed to the delivery of touring exhibitions of contemporary visual culture to remote and metropolitan communities throughout Australia. It would be an excellent service to support a new venue. Annually, it tours over 50 exhibitions. Exhibitions can be purchased starting from \$2,000.

We have allowed for four major exhibitions which might hang for two and half months each and several community exhibitions a year in the program to allow a year-round presence.

Non art uses - meetings and conferences and other alternative uses

PAC Australian Economic Activity Report 2019, 24% of activities held in PACs were non-art related.

Seminars, conferences, expos, weddings and functions, meeting rooms, ceremonies, awards nights, etc. are non-arts events that might provide additional revenue streams for the PAC.

CCC itself might use it 10-15 times a year for all staff meetings, citizenship ceremonies and other events such as staff award nights, Australia Day or Anzac ceremonies, Reconciliation breakfasts etc.

The main theatre could be occasionally hired to companies requiring a large space for all of staff internal meetings or customer information sessions. This is likely to be mainly in-service industries

and demand is likely to be limited. For example, the Hopgood have some meetings from service agencies and government service providers which are located at Colonnades (and the Health hub). These are occasional – maybe 2-3 a year.

Smaller meeting rooms or rehearsal rooms could be built into the PAC and used for meeting spaces for government service providers, other locally based businesses and community groups which would help to drive activity in the PAC. The well-equipped meeting rooms at the Marion Cultural Centre are well used, but the Centre is adjacent to the Marion Shopping Complex and all the service providers (both private and government) that are located in the immediate vicinity.

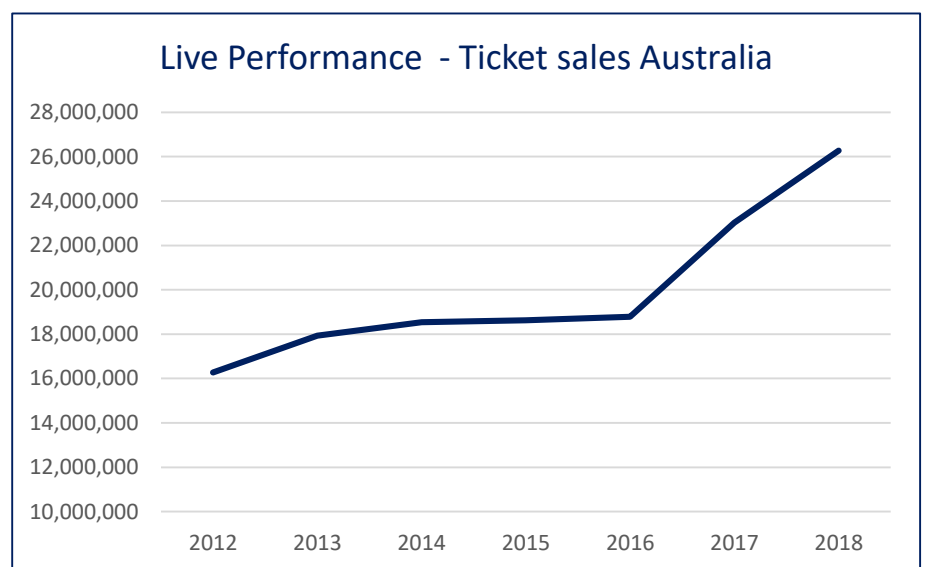
Conferencing and functions are often presented as potential revenue earners for performing arts centres. The reality is that in Adelaide this is a competitive market. The existing CCC function centre is not used for conferences but rather private function hire. Larger conventions are likely to seek a CBD location – Convention Centre or Adelaide Oval. Smaller conventions and events such as weddings to hotels or other venue centres. There is a market for expo spaces but these are mostly held on weekends when there is likely to be high demand for the venue as an arts space. Functions and conferences also require additional staff and facilities such as a commercial kitchen and a separate financial analysis would need to be undertaken to test the income potential against the capital and operating costs. The prospect of this being a successful and sustained revenue stream is slim.

Depending on where the Campbelltown PAC is located there might be some capacity to partner with another venue, such as a hotel, to co-host conferences particularly in regard to providing a “main stage” type venue for conferences.

Audience demand

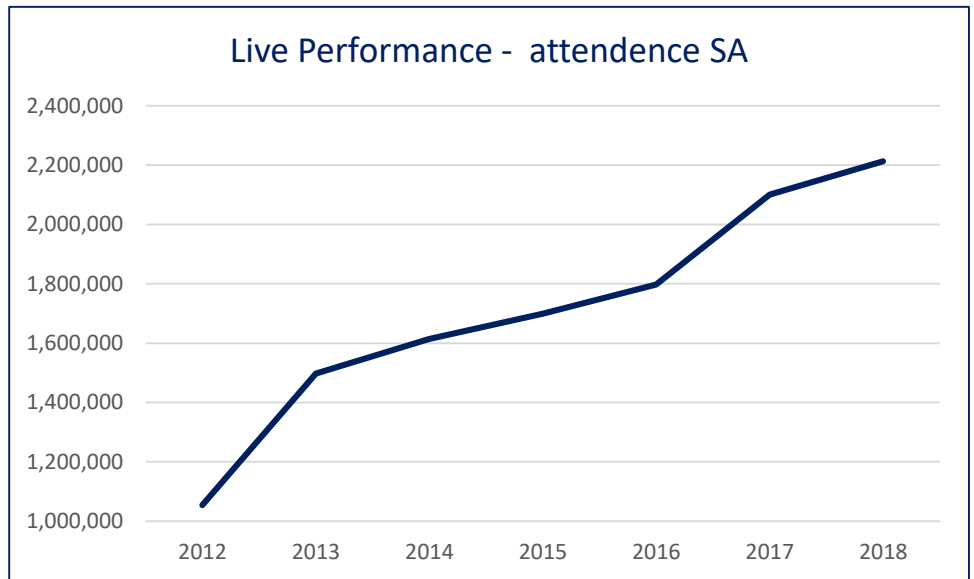
Attendance at live performing arts events was, pre-COVID, increasing dramatically. Approximately 26.3m tickets were issued in 2018, representing an increase of 14.1% from 2017, when 23.0m tickets were issued.¹⁵ These figures are only for ticketed events and do not include large scale free events.

The trend is even more pronounced in South Australia where attendance has doubled.



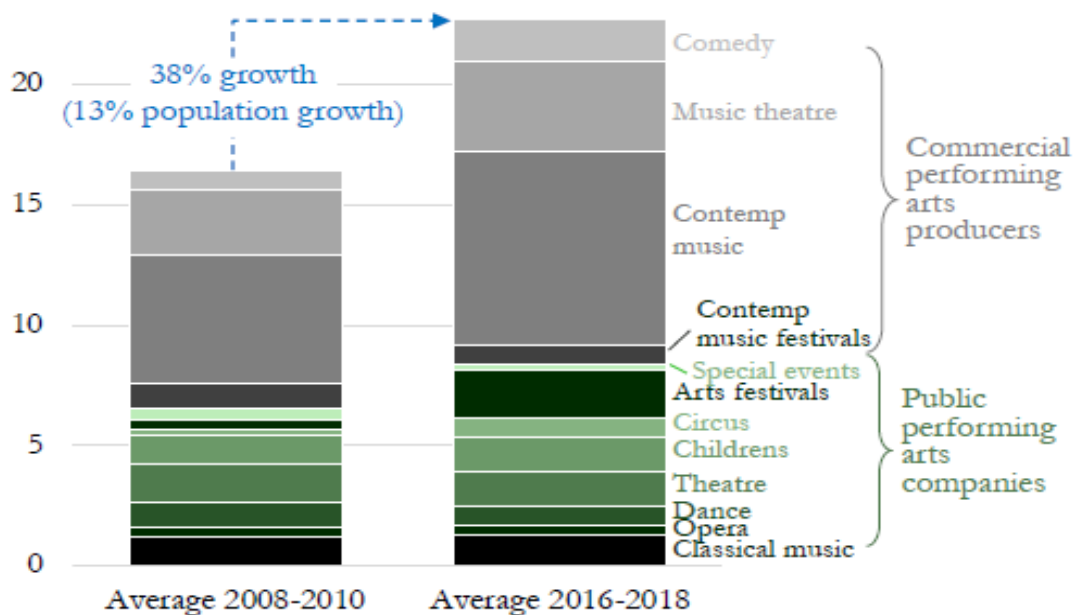
¹⁵ LPA, Ticket Attendance and Revenue Report 2018.

Ernst and Young have tracked ticket sales for the LPA for over a decade. The growth in attendance has largely been experienced across the board and the most dramatic growth has been in Musical theatre, live music, comedy and multi-category festivals. The most dramatic decline has been in traditional theatre.



Growth in many more traditional formats – classical music and opera, are from outdoor large scale and accessible events. Opera in the park for example. The graph below was from Daley, J. (2021). Performing arts advocacy in Australia captures these trends, p.7.

Figure 2.1: Performing arts audiences have grown rapidly in the last decade
 Number of ticketed attendances to Australian performing arts at major venues (million)



Notes: Excludes unticketed free events. Three-year averages smooth annual volatility. "Arts festivals" only includes multi-artform festivals; festivals dedicated to a particular artform (such as the Melbourne Comedy Festival) are classified with that artform.

Source: LPA (2019a).

It is too early to measure the long-term impacts of Covid on attendance, as Covid restrictions and restrictions on travel are having a continuing impact and will likely continue to do so well into 2022. However, in the longer term there is considerable optimism in the industry (as was confirmed by the consultations as part of this project.) Also, recent events, such as the 2021 Adelaide Fringe are cause for optimism. While ticket sales were down around 25%, this open-access festival featured more than 900 events over 31 days – including 85 in outdoor spaces – and attracted an estimated total attendance of 2.7 million. Despite border restrictions, restricted capacity and check-in requirements a total 632,667 tickets sold.¹⁶

A possible future program and potential utilisation rates

Based on the information above we have devised a potential draft program for the proposed Campbelltown PAC. This is hypothetical and an example only which has been developed to show the range of programming that might be possible in this sort of venue and to test venue utilisation.

Successful theatres should be aiming for around 70-90% utilisation of days where the venue is available. The number of available days across a year is rarely 365 days. There are very quiet periods over Christmas, New Year and Easter and in many cases, higher staffing and operational costs preclude venue utilisation on days such as public holidays or Sundays.

It is also important to maximise the number of available days by co-ordinating maintenance with quiet periods and not allowing shows too long to rehearse or bump in and bump out and to minimise dark days between performances when shows are in the venue for an extended period.

Utilisation rates across Australia - State averages					
(SA not available due to insufficient sample size)					
State	Days Available	Days Used	Utilisation (when available)	Absolute average utilisation (main stage)	Sample size
NSW	311	255	82%	70%	20
QLD	328	240	73.2%	66%	8
TAS	277	207	74.7%	57%	3
VIC	294	275	93.50%	75%	14
WA	297	228	74.7%	62%	8

Data from PAC Australia (2020) 2019 Economic Activity Report – Performing Arts Connections Australia, p.18

Based on the program prepared for the proposed Campbelltown venue which was based on consultations with other local venues in Adelaide and potential hirers, the Feasibility Study concludes the proposed PAC would sit comfortably within the recommended utilisation rates and would achieve a venue utilisation rate of available days of 86% and an absolute annual utilisation of 76.44%.

¹⁶ [It's a wrap: 2021 Fringe sells \\$16.4m worth of tickets \(indaily.com.au\)](https://www.indaily.com.au/its-a-wrap-2021-fringe-sells-16.4m-worth-of-tickets)

Proposed Campbelltown PAC utilisation rate based on prepared program

Days Main stage used	Days unavailable	External Hires	Self-present Programs	Free Community Use	Utilisation available days	Total utilisation	Total performances and activities
279	40	181	59	34	86%	76.44%	406

* Days unavailable include Bump in Bump out days and certain public holidays such as Easter

This aims to calculate events and performances with an audience which would mostly be on the main stage. This does not include use of the meeting rooms, rehearsals, foyer gallery attendance and a range of other activity that ensures utilisation of the centre.

The performance activity would be supplemented by a visual arts program of four exhibitions each running up to 2 ½ months with a two-week rest. Some of these exhibitions might be purchased from the National Exhibitions Touring Support (NETS) Australia.

Break down of possible performances by Hire type and Hirers

Hire Type	Hirers	Space	Days /Nights per year	Performances
Straight venue hire	Dance Schools/Comps and Other Children's training	Main Stage	50	100
	Schools	Main Stage	40	80
	Schools	Rehearsal Room	Use of the rehearsal room space for school tuition has not be included	
	Corporate Hires	Main Stage	5	5
Door Splits	Commercial	Main Stage	12	18
	Adelaide Fringe	Main Stage	5	10
	Adelaide Fringe	Rehearsal Room	5	10
	Community Theatre (Season 1)	Main Stage	18	12
	Community Theatre Season 2		12	9
Venue Programming	Community Hires	Main Stage	22	22
	Community Hires	Rehearsal Room	12	12
	Out Of the Square Programming	Main Stage	11	4
	Morning Melodies	Main Stage	3	3
	Adelaide Fringe	Main Stage	10	20
	Adelaide Fringe	Rehearsal Room	5	10
	Festivals	Main Stage	5	7
	Festivals	Rehearsal Room	5	5
	Events	Outdoor	5	5
	School Holiday Performances	Main Stage	10	20
	school Holiday Workshops	Rehearsal Room	10	20
	Community Use (Free of Charge)	Main Stage	11	11
	Community Hires (Free of Charge)	Rehearsal Room	11	11
Council	Council use	Theatre	4	4
	Council use	Rehearsal Room	8	8
Total Days Use			279	
Total Performances/ Activities				406

Analysis and recommendations

The key findings of Section 2 on “Demand analysis” are as follows.

- Based on analysis of existing Adelaide theatre venues, consultation with other council run venues in Adelaide, consultation with potential hirers, research provided by Arts SA and a survey aimed at local hirers, this study concludes there is a lack of well-equipped theatrical venues in Adelaide. This shortage is particularly strong in the east – north -east of the city.
- There would be a high level of demand for the proposed Campbelltown PAC.
- A well-equipped, mid-size theatre in Campbelltown would have a catchment area from Magill to Salisbury.
- There would be strong demand from a range of professional and community hirers for a new Performing Arts Centre in Campbelltown.
- There is growth in festival and events, particularly outdoor formats. If space permits, priority should be given to having an outdoor space for activities.
- Partaking in established performing arts festivals is important to market and promote the venue and draw new audiences and create venue awareness that supports generating new and repeat business for both hirers and audiences.
- A foyer gallery will enable visual art exhibitions which are important to draw visitors to the Centre.
- Schools would be larger users for performances but also potentially use spaces for delivering classes.
- There is particularly strong demand from dance and calisthenics schools and competitions.
- Meeting the needs of dance schools and dance competitions– large stage with wing spaces, large backstage dressing room area and relatively large auditorium - is essential because they will be an important full fee-paying client.
- The revenue to be derived from conferencing and events will be limited.
- **A competently run PAC in Campbelltown would be well used achieve a venue utilisation rate of available days of 86% and an absolute annual utilisation of 76.44%.**

3. SOCIAL AND ECONOMIC BENEFITS

Cultural Infrastructure has a number of clear benefits:

- Community Benefits including
 - provides joy, entertainment and enriches lives,
 - helps keep community members engaged,
 - is important component to education and child development.
- Place-making and reputational benefits.
- Driving social cohesion.
- Supports other economic activity.

A PAC with a gallery space and appropriate space for community activation would be a hub to increase the viability of and participation in cultural activities. Clustering the community's existing cultural activity in a central location could raise awareness of current programs and will provide a critical base to grow new programs, participants and audiences. An active PAC is a place to celebrate community achievement and aspirations as well as a place to reflect on and participate in contemporary cultural debate with professional artists. It is also a place to celebrate our cultural diversity and history in a shared safe space with neighbours.

Community benefit

Arts and cultural venues improve people's experience of a community by providing entertainment and texture to life. In essence, arts and culture enriches lives and gives people something to do and somewhere to go. A life without arts and culture would be pretty boring and bleak. A local PAC will be more readily accessible for locals, particularly those who have challenges traveling to the city.

In addition to providing entertainment, arts and cultural activity can help drive community engagement for individuals, both as audience and as participants. This can be achieved through hosting arts organisations, such as a choir for the elderly, and through providing entertainment that is appealing to local audiences. This increased social interaction can reduce loneliness; increase confidence; and improve feelings of self-worth. These outcomes, in turn, have a direct and positive impact on both physical and mental health.

Research shows that engagement with arts and cultural activities reduces health risks, particularly for mental health and other risks directly influenced by the existence of social networks. "Engagement helps generate a bigger and more diverse social network. That leads to improved social capital. This then has a central influence on improved access and quality of Health Care."¹⁷

Cultural investment is an important factor for families when they consider residential decisions as arts and culture are important in developing children's intellectual and social capacity. A PAC with an active and vibrant program will be an attractive asset for local schools as well as for the local community.

"Young people demonstrably benefit from arts and culture-based learning: the positive relationship between exposure to arts and culture and student outcomes is well

¹⁷ A New Approach, 2020, 'Health and wellbeing: Transformative impacts of arts, culture and creativity' [Factsheet 4]. Produced by A New Approach think tank with lead delivery partner the Australian Academy of the Humanities, Canberra.

researched and documented. The knowledge, skills and insights arts and culture-based learning provide are helping young people build enduring social and personal capabilities and positive educational outcomes and experiences.

Education that includes arts and culture can help students in a wide range of subjects, including maths, reading and science, by building transferable skills that 'spillover' from one subject to another."¹⁸

Place making

A successful community needs roads, schools and hospitals but it also needs a civic and cultural heart. This is equally applicable to a smaller community such as Campbelltown as it is in a large city.

In a community like Campbelltown, a new PAC, particularly one housed in an iconic building, would have a profound impact. It would help to provide a central reference point for the area as well as changing how locals see themselves and how they are viewed by other.

There are countless examples around the world, such as MONA in Hobart or the Guggenheim in Bilbao, where cultural facilities have seen communities reimagine themselves and transform their reputations locally and internationally. These institutions are widely credited with reviving cities by boasting the self-worth of populations and directly driving tourism.

Similarly, Deloitte reported that the Sydney Opera House has a social asset value of \$6.2 billion dollars including \$2.2 billion in existence value. Existence value is a way of capturing the value of a public institutions such as the Opera House to people who do not directly use their services. For example, the Opera House contributes more broadly to Australian culture and identity in a way that benefits all Australians. Deloitte surveyed over 3,000 people and found:

- 88% agreed that the Opera House is an iconic landmark that contributes to Australia's national identity and international standing
- 73% said that the Opera House makes a significant or very significant contribution to a unique culture in Australia.

Survey respondents were then asked how much value they place on the venue by identifying how much government funding it should receive just to exist. "On average, NSW residents considered the Opera House precinct should receive \$18.10 per household, equating to a total existence value in NSW of \$55 million. Across the rest of Australia, the existence value was \$16.10 per household, or \$110 million. This makes total existence value of the Opera House precinct \$166 million per annum."¹⁹ A PAC in Campbelltown will have a similar effect but on a smaller scale commensurate with its impact on a suburban community, not an entire nation.

If an outdoor area is part of the design, it can also act to create a physical hub for the area. A shared public space can play a critical role in creating a common sense of community. This is true for large centres as well as small towns. A public place provides a space for people to come together and interact. Whether this is having a sandwich on a bench at lunch time, a picnic with friends or for

¹⁸ A New Approach, 2020, 'Education and learning: Transformative impacts of arts, culture and creativity' [Factsheet 5]. Produced by A New Approach think tank with lead delivery partner the Australian Academy of the Humanities, Canberra.

¹⁹ Deloitte (2018) Revaluing Our Icon Midpoint in Sydney Opera House's Decade of Renewal, p.15, p.19.

special occasions, large screen broadcasting a significant sporting event, or people coming together at times of grief. These are important building blocks of successful communities.

“Amanda Burden (Commissioner for the New York City Department of City Planning: 2002-2013) contends that where people go and where people meet is at the core of what makes a city work. These public spaces and the quality of the public space available can be a factor in the success of any community, large or small, in terms of sociability, functionality, accessibility or indeed, the want to live within that community.”²⁰

A new PAC could contribute to civic pride and how locals see themselves. MONA provides a good precedent, all be it on a larger scale. MONA is often credited with turning around Tasmanians’ attitude to the state. As expressed by Tasmanian salmon producer Huon Aquaculture Group’s executive director and co- founder Frances Bender:

“It put us on the international map and put us on the international tourism map, but ... it actually turned on our sense of pride. All of a sudden we became really proud of who we are and what we are and what we do, and how clever we are. We’re not the second cousins from the little state that’s forgotten down the bottom anymore. ... From that moment on, there was just this level of positive affirmation about what we could do as Tasmanians.”²¹

A similar effect, albeit on a different scale, could be generated through the proposed new Campbelltown PAC.

Social cohesion

Art and culture provides a mechanism through which people can convey to each other their own experiences in a manner that can be understood both rationally and viscerally. Art can transcend gender, sexuality, race and any other marker of difference between people. The sharing of our stories and experiences through art can help to grow mutual understanding between people from different cultures and backgrounds which fosters social harmony.

A strong creative culture provides opportunities for sharing cultures and values, supporting existing and new forms of artistic and cultural expression, experiencing diverse voices and perspectives, and developing and maintaining national and local cultural heritage. Culture is key to both personal development and developing a cohesive society. Arts and culture provide pathways to imagining different worlds and expressing divergent views – offering implicit invitations for understanding and connection.

Leading Australian and international research shows that when a considered effort is made to direct cultural and creative activities towards improving social cohesion, the impacts are significant and:

- build feelings of community, belonging, trust,
- enhance empathy and inclusion,
- help combat the growing issues of loneliness and isolation,

²⁰ David Kraljik, unpublished dissertation manuscript The Value of Public Space – A town Square in a Small Urban Community.

²¹ https://www.bca.com.au/tourists_love_mona_but_tasmanians_are_proud_of_it

- increase civic participation and make cities, suburbs and regions more liveable.²²

Economic activity

A PAC could drive economic activity in the area through the construction of the venue and the ongoing operations of the venue. The most immediate impact would be the construction impact outlined in the table below. This impact is by its nature time-limited to the construction period.

Economic impact on \$25-30 million construction over two years (SA)		
Output (\$ million)		
\$ 25.00 - 30.00	\$ 47.55 – 57.07	\$ 72.55 – 87.07
Direct contribution	Indirect contribution	Total contribution
Employment (ongoing over two years)		
17 – 20	71 - 85	88 – 105
Direct contribution	Indirect contribution	Total contribution
Wages and Salaries (\$ million)		
\$ 2.78 - 3.34	\$ 9.81 - 11.77	\$ 12.59 - 15.11
Direct contribution	Indirect contribution	Total contribution
Value-added (\$ million)		
\$ 5.53 - 6.64	\$ 19.56 - 23.45	\$25.08 - 30.09
Direct contribution	Indirect contribution	Total contribution
<p>These figures are produced using REMPLAN economy. All figures, data and commentary are based on data sourced from the Australia Bureau of Statistics (ABS), most of which relates to the 2016, 2011, 2006 and 2001 Censuses. Using ABS datasets and an input / output methodology industrial economic data estimates for defined geographic regions are generated.</p> <p>Economic Output is the value of goods and services.</p> <p>Jobs represents employment.</p> <p>Salaries and Wages is the payment made to local workers.</p> <p>Value Added reflects the marginal economic value that is added by tourism related activities, which is estimated by subtracting expenditure on intermediate goods and services from tourism output (gross revenue). The direct value add measure enables meaningful comparisons of industry size to be made between industries.</p> <p>The figures have been rounded and made not add up exactly</p>		

In addition, the direct activities of the PAC create an ongoing economic impact. A PAC can draw additional visitation to the area and some of those visitors will contribute to the local economy by spending money in bars, restaurants and local shops. As the size and location of the Centre are not yet known, these calculations to determine the ongoing economic impact of the project have not been undertaken. The impact of the visitor economy in the Campbelltown area is likely to be constrained because of the lack of tourist facilities in the area. The centre could however act as a stimulator to additional investment to build facilities to benefit from the increased visitation.

²² A New Approach, 2020, 'Society and place: Transformative impacts of arts, culture and creativity' [Factsheet 1]. Produced by A New Approach think tank with lead delivery partner the Australian Academy of the Humanities, Canberra.)

Analysis and recommendations

The key finding of Section 3 on the social and economic benefits are as follows.

- A PAC will deliver strong community benefits
- A PAC will foster social cohesion
- A PAC will create a central community hub and will change how others see Campbelltown and how locals see themselves.
- It will help to improve facilities available to schools and attract new residents who are sensitive to opportunities offered to families and children
- A PAC will drive economic activity

4. SIZE AND STYLE OF THEATRE

The exact size of the proposed PAC will be dependent on a range of factors which have yet to be determined, such as the size and the location of the site which in turn will also affect parking capacity. As part of this study, two consultations were undertaken with architectural firms and they have informed this section but are not responsible for the content. It is also possible there might be architectural solutions to some of the issues identified.

Rather than provide exact advice, this study will outline some principles and ideas which will hopefully help the Council in its future deliberations and will inform any architectural process the council chooses to undertake going forward.

Principle 1 – Build what you need

The acoustics, site-lines, seating configurations, disability access, toilet facilities, parking, access and many other factors are all worked out according to the capacity of the theatre. The idea that you can build an 800-seat theatre, for example, and then just section it off with drapes or other technical devices (such as retractable walls if it more of a black box design) and it will work just as well should be avoided as a basis for the design. Based on the consultation with the venue managers, in practice, many of these dividable space tools are rarely used. The simplest mechanism, moveable drapes, are themselves quite expensive, need replacing and reduce the acoustic qualities of the room. More technically driven solutions can be expensive to maintain and need to be replaced periodically adding to operating costs. Anything that is overly complicated to use also adds staffing requirements which drive up venue costs for hirers. Having too many flexible space tools also risks making the venue something more akin to a conferencing hall or lecture theatre which will reduce the artistic quality of the venue and make it less appealing for artists.

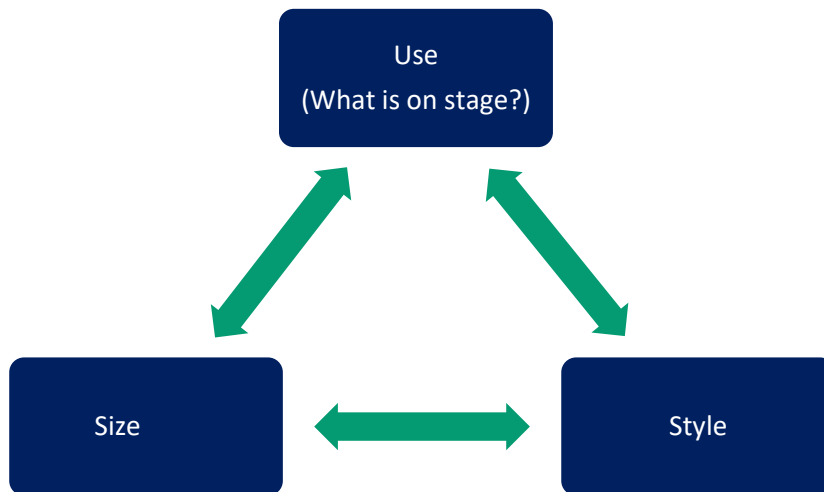
Key Finding: The venue should be designed so that it meets requirements. Flexibility is important but theatre quality should be prioritised.

Principle 2 – Accommodate Dance schools

Dance schools, as well as other children's training, are an important client as they are a full fee-paying client with high usage demands. They will be an important part of the Centre revenue and will improve the financial sustainability of the venue. Dance school concerts and competitions require large stages and large back of house facilities. If a dance school has 200 -300 students, they all need to be able to wait off stage waiting for their performance in the show. They also need large wings and cross-over areas. As well as meeting their Back Of House requirements, they have indicated through the survey and consultations that they favour larger venues of at least 350 seats at a minimum

Determining usage

The style and size of a theatre are directly related to the intended use of the theatre and how actively the CCC wish to be involved in programming the venue to obtain public purpose outcomes.



The first issue to address is whether it a facility for the CCC to hire for commercial and community use, or is it a venue that CCC use to put on events and activities for the community. The second important factor in determining size is whether the vision for the theatre is to be a local venue servicing only the local community and prioritising community usage of the facilities or a venue which a grander ambition to meet some of Adelaide’s broader theatre needs and primarily servicing the local community through audience participation.

Program led or facility management

A program led approach would entail that the centre itself is presenting material and curating activity in addition to managing the venue and hiring it to external hirers. This model is used by the large capital city performing arts venues and some smaller council run venues. In the Adelaide context, the most actively programmed local government run venue is the Marion Cultural Centre. A program led or curated approach enables the Council to endeavour to maximise the social benefits, such as increased community cohesion, by programming to achieve certain social outcomes. This might include, for example, presenting some material specifically designed to appeal to new cultural groups in the Campbelltown area or programming designed to help teenagers address the challenges they face around sensitive issues such as on-line bullying or body image.

A facility management model has a stronger focus on hiring to external hirers. Of course, in a council operating environment some discretion would be required as to whom the venue is hired to but on the whole the main activity in the centre would be selected by groups and organisations external to the CCC. This is likely to lead to a more mainstream content within the Centre and less focus on minority programming.

This model lends itself well to a venue that is run jointly with a school because so much of the time is already used by the school that there are only small gaps of availability to program material that is difficult to warrant employing staff to undertake the task. Two examples of this sort of venue would be the Golden Grove Arts and Recreation Centre and also the Theatre at St Ignatius College.

Whether the venue is to be curated or not is a matter of scale, rather than an either or, but nonetheless the Council should determine the extent to which they want to be involved in curating the program for any PAC. The further down the program led scale, the higher the operating subsidy will be need to be.

Key finding: The Campbelltown City Council need to give consideration to its vision for the centre and whether it wishes for the Centre to be actively programmed and an agent for effecting social change. A curated venue will deliberately seek some material that is aimed at drawing new audiences, including those from cultural or other identity groups who might be less likely to use a Performing Arts Centre.

Local or regional centre

A local PAC is one that is most will be mostly used by locally based community organisations to host performances and would be supplemented by some local level touring. A regional centre will be more focused on national touring networks and will seek to maximise the amount of professional content on stage to maximise audiences.

Theatres, like sports venues, exist on a continuum of community venues at one end of the scale and professional venues at the other. A location like the ARC or the Campbelltown Soccer Club facilities are at the community end of scale and Adelaide Oval or Hindmarsh Stadium are at the professional end of the scale. In the arts, the Goodwood Institute or the Pt Noarlunga Arts Centre are at the community end of the spectrum and the Adelaide Festival Centre is at the other end. The distinction is not pure. Kids play at Hindmarsh stadium at half time and plenty of amateurs do “walk the boards” at the Festival Centre. The community end might have some semi-professional users such as the Campbelltown Senior Soccer Team or some of the Fringe performances at the Marion Cultural Centre.

However, on the whole, with the community facilities the benefit for the community is primarily derived from participation as performers or players whilst at the professional end the community benefit is primarily derived from participation as part of the audience.

Performances by non-professional performers will, by and large, only attract an audience which is directly connected to the performers. Some of the boarder social benefits outlined in the previous sections, such as entertainment value, increasing visitation and fostering social cohesion, are less likely to be obtained with a venue focused on non-professional artists but there is likely to be a higher direct community benefit in terms of facilities usage.

Key Finding: The Campbelltown City Council need to give consideration to its vision for the centre and whether it wishes to prioritise community benefit through audience or by participation as performers. This will impact the necessary size and style of the venue.

The impact on the program of going with a community led approach or a professional led approach can be seen by comparing the programs of the Marion Cultural Centre and the Art House in Wyong on the Central Coast of NSW. Based on the site visits and in consultations, the Marion Cultural Centre is considered to have the most active program and highest level of community engagement of council run venues in metropolitan Adelaide. The Art House in Wyong was recommended by a number of consultees as being amongst the best, small professional program led venues in the country. The Hopgood at Noarlunga is the closest equivalent in Adelaide in terms of the size and level of technical capacity but the facilities are dated and the venue is under-funded to lead an aggressive programming approach like that of the Art House in Wyong.

The programs for the Marion Cultural Centre and the Art House are included in appendix 4. The main difference is that Marion’s program is a combination of community activity, dance school related activity – which is not listed on the program – and local touring such as Racheal Leahcar singing Beetle’s songs. The Art House is still reliant on dance school related activity but the professional

program is very much of a national touring level. It includes a lot of venue led programming, co-productions with national professional arts organisations like Opera Australia and well-known comedians such as Ross Noble and Arj Barker and top-level national touring tribute bands – like the Australian Bee Gees Show.

Replicating something like the Art House at Wyong will require a larger auditorium to attract commercial presenters as well as a better equipped theatre.

Choosing to progress a community or professional led program will have considerable impacts on the size of the venue but also the operating subsidy required as outlined in the table below:

Local or Regional PAC (Marion Cultural Centre and The Art House Wyong)		
	Marion Cultural Centre, 2019	The Art House, Wyong, 2019
Size	300 seats	500 seats
Theatre	<ul style="list-style-type: none"> ➤ No fly ➤ Limited wing space ➤ Raised or flat stage 	<ul style="list-style-type: none"> ➤ Fully equipped proscenium arch theatre ➤ 12X9m stage ➤ Fully automated fly system ➤ 285m² studio space with retractable tiered seating for 130 people
Ticket sales	19,966	48,238
Ticket sales income	\$130,757	\$2,109,904.05
Patronage	52,901 for 1330 venue hires	65,027 (excluding exhibition and Café, Box Office walk-ins)
Events	<ul style="list-style-type: none"> ➤ 94 events 	<ul style="list-style-type: none"> ➤ 263 Events / performances ➤ 142 ticketed performances in the main Theatre ➤ 51 different unique community hirers ➤ 61 % of all hirers were community
Visitation	Unknown – likely to be limited	<ul style="list-style-type: none"> ➤ 22.6% Total ticket sales purchases are from outside Central Coast postcodes ➤ 54.4% from other Central Coast postcodes (outside of 2259)
Staff	3.5 FTE (+1 Manager with additional duties)	8 FTE
Council annual contribution	Estimated \$250,000	\$1,057,000 from the Central Coast Council ²³

Size

Theatres come in natural sizes (or sweet spots) usually considered to be around 350, around 500 and around 800 and large commercial theatres of 1,500-2,000. This a very rough rule of thumb.

Campbelltown City Council are not considering a large commercial theatre to compete with the Festival Centre or Her Majesty's Theatre so this option is not considered.

²³ Central Coast Council, Financial Reports Central Coast Council 1 July 2018 to 30 June 2019, p.28.

800 seat theatre

A well-equipped 700-800 seat theatre would meet an immediate need in Adelaide and would only be matched by the Dunstan Playhouse. It could be a truly iconic building which could become a landmark for Campbelltown and indeed Adelaide. It would be an appealing size to commercial producers and some of the bigger end of year dance school/calisthenics or school concerts have indicated a need for a venue of this size. The only time a school would require such a large venue is for the end of year concert (which by its nature is a limited demand). Such a large venue would likely require a second tier of seating which would increase capital costs considerably. It would also be too large for most locally based community usage and would therefore necessitate the construction of a second smaller theatre further adding to costs.

An increase in size will also often result in an increase in technical capacity to meet the needs of hirers who need larger capacity venues. The increased level of technical equipment normally results in higher hiring fees as the venue attempts to off-set the increase costs. A higher level of technical equipment also increases the need for technical staff. Large theatres will also have higher operating costs eg air-conditioning, more staff for performances.

An 800-seat venue would remain a second choice to the CBD and there is a considerable risk because some performers needing a venue of that size are still likely have a preference for CBD performances. If the venue is too large for local hirers and is second choice for national touring presenters, it runs the risk of underutilisation.

Key finding: A 700- 800 seat theatre is considered too large and is not a recommended option.

500 seat theatre

Ensuring the venue is a single tier venue (i.e does not have a balcony) will help to limit the cost of construction.

Around 500 seats, like the Melbourne Theatre Company or the Arts Theatre on Angus St, is roughly the maximum capacity for a single tier theatre designed to accommodate drama because otherwise the back seats are too far away from the stage. Music venues can have larger single tier capacity because sight lines are less important.

The advantages of a 500 seat venue include:

- It will attract a higher calibre of touring show. A 500 seat theatre as opposed to one around 300-400 seats would allow a broader range of commercial shows to play, including some national touring quality shows. Size is important to commercial producers – the more seats, the more tickets can be sold. Several professional hirers, consulted as part of this study indicated they would only consider hiring venues from 450 seats +. This was confirmed by a number of venue operators.
- It would be appealing for dance school concerts and for some school usage.
- It would appeal to the larger community theatre groups.
- This is a size that might appeal for commercial children's shows such as Bluey, or for music performances for older audiences who appreciate comfortable seating. These shows do sometimes play at the Hopgood Theatre in Noarlunga which has a capacity of 490 seats.

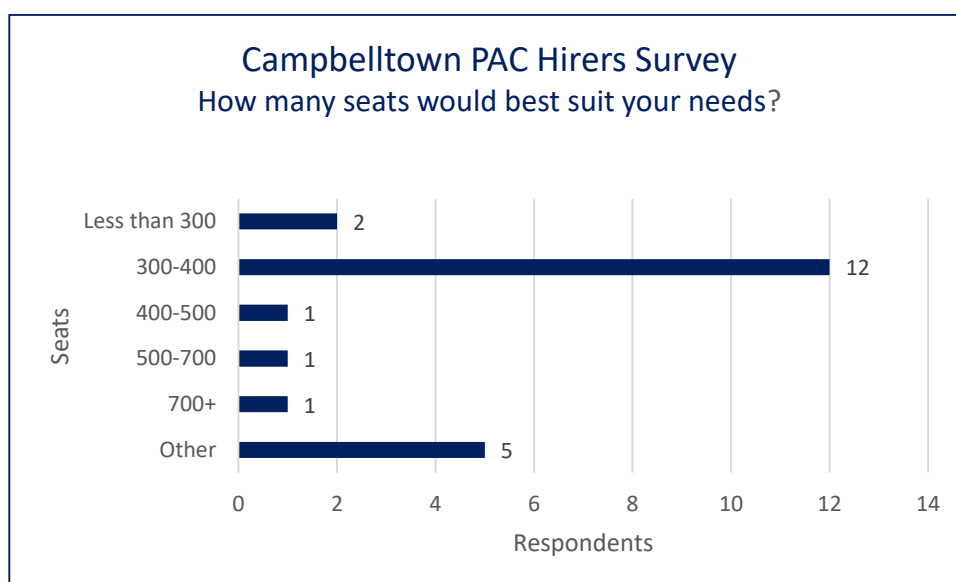
The risks with a 500 seat venue include:

- It is still quite a large theatre for many of the local hiring users and as outlined above in the section on 800 seat theatres, it might be an uncomfortable experience for audiences and performers for smaller events and shows.
- Noarlunga is an important population centre that is much further from the CBD than Campbelltown. Producers stage shows at Noarlunga Theatre (490 seats) to tap into this market but might not consider it necessary to do so in Campbelltown because they might believe patrons would travel to the CBD in any case. It is clearly easier to stage more performances in one location that to do two different runs. If the venue cannot attract these type of performances, one of the main factors behind choosing a 500 seat venue becomes redundant.
- For self-presented shows, the larger the venue, the higher the calibre of show, the more expensive the show becomes and the level of risk also increases with straight performance fee arrangements or other profit/risk share presentations.

380 seat theatre

A smaller, more intimate theatre of between 250-300 seats to accommodate local usage was considered as an alternative to a 500 seat venue. However, a theatre of under 350 seats is likely to be too small for dance schools, dance competitions and other children’s performances who would all be important commercial hirers of the venue. To meet the needs of dance schools whilst still remaining small and intimate enough for smaller performances, a theatre of 380 seats was identified as the optimum capacity. Anything larger risks losing venue intimacy and likely to become too large for other local and community hirers.

A smaller venue will cater better for smaller local shows. The survey undertaken for this study there was a clear preference for a venue between 300-400 seat.



The group indicating 300-400 included 4 of the 6 dance school/children’s training organisations. The other two specifically requested over 400 seats.

The four Adelaide metropolitan venues visited as part of this study were:

- Shedley Theatre at Playford 387 seats
- Marion Cultural Centre at 300 seats
- Golden Grove Arts Centre at 377 seats
- Hopgood Theatre at Noarlunga 490 seats – single tier auditorium – raked seating

Each of these venues reported that they considered their capacity to be sufficient for their users and for the purposes that they were trying to achieve. The Shedley indicated, that if anything, its capacity was slightly larger than it needed to be. The larger capacity of the Hopgood Theatre is sustainable from an audience capacity because the distance from the CBD marks it more like a regional centre.

A 380 seat theatre is sufficient for the sort of local touring that features strongly on the Marion Cultural Centre Program and is promoted through the Out of The Square network. Most hirers of a 380 seat venue are more likely to be from community or locally based semi-professional performers. The social and community benefits of the theatre would be primarily realised through community participation on stage as opposed to benefits derived from audience participation. The audience appeal of many community performances is often limited to family and friends of the performers

A smaller venue will limit the range of activities that can be presented. It will mean there is a narrower range of entertainment provided locally for local audiences. It will also therefore limit some of the social and economic benefits outlined in the earlier section of this report.

Key Finding: If Campbelltown Council are keen to have a regional centre style venue, akin to the Art House in Wyong, 500 seats should be considered for the main stage venue. If a more local venue is under consideration, a venue of around 350-380 would still be small enough to accommodate most users but large enough to be attractive to dance schools and competitions.

Style of theatre

This section offers some general ideas of potential requirements for a venue in Campbelltown based on site visits, consultations with venue operators and discussions with potential hirers. This information might help guide the theatre design, but that design is best left to an architect and technical theatre consultants and managed through a value management process.

There are four basic theatre types:

In the round – seats around a stage

Thrust stage – stage thrusting out into the auditorium

These theatre types are primarily for drama and would not be suitable choices for a multipurpose venue. The more viable options are a black box or a traditional proscenium arch theatre.

Black box

These are flexible performance spaces which when stripped to their basics are a single room painted black, the floor of the stage at the same level as the first audience row. Usually, these spaces allow for the temporary setup of seating in a number of different configurations to enable a wide variety of productions to be presented. A black box offers flexibility. This would be particularly beneficial for non-arts uses such as conferencing and functions. The main issues to consider with a black box are:

- Some professional users, particularly theatre groups, like totally flexible spaces to explore their stage craft. Non-professional users often find black boxes harder to use and as one

participant in the community consultation exclaimed – “a black box is useless” – a comment met with considerable agreement.

- Retractable seating is essential in a black box as it provides flexibility but it has limitations. It is often uncomfortable and does not provide the luxury and comfort of fixed seating. There is a considerable range of seating options which would require more specialised input during a design process.
- Flexibility increases potential usage but also can add costs because it requires staff to move things and any moving parts are more likely to need periodic replacement. In addition, any mechanical parts need inspection, servicing and periodic replacement.
- Black boxes can lack character and suitability to other events unless they are “dressed” which again adds costs. The local footy team does not necessarily want its end of year show in a black box.

Key Finding: A purely conceived black box theatre is not recommended.

Proscenium arch theatre

A proscenium arch theatre has a fixed stage and an architectural frame, known as the proscenium arch which demarcates the stage from the audience. These are traditional theatres and will often have a fly system for “flying” sets and other items on and off stage.²⁴ These will also often have an orchestra pit.

A proscenium arch theatre is the classic theatre design and is generally what people perceive a theatre to be. This is important for many hirers such as schools and children’s training groups who want to provide students and those who come to watch them with a sense of a theatre experience.

The draw back with a purely conceived proscenium arch theatre with a raised stage and fixed seating is the lack of flexibility and “the problem with permanence is that you are stuck with it.”²⁵

Best of both worlds?

The solution might be something that can to a degree provide the best of both worlds. Potentially a mixture of permanent raked seating and removable seating to enable different modes – standing for concerts, conferences, cabaret seating.

This might look like a fixed stage which can be lifted or flattened and possibility behind a “hard curtain” with retractable tiered seating in the front half of the auditorium with fixed seating at the back – the undercroft of which can provide storage solutions.

Other Requirements

In addition to the actual theatre, it will be important for the PAC to include spaces that can be used for to support theatrical productions but can also be used for other community purposes.

Back of House and Front of House requirements would include dressing rooms, toilets, showers, a loading dock and storage areas. A range of other rooms for hirers and community use which can be used as meeting rooms and potentially also used as additional dressing rooms or as a green room will help to maintain activity and meet non-arts community needs as well as enhancing the capacity of the PAC from a performing arts perspective. In addition, a multi-use foyer which includes a box office and

²⁴ UK Theatre Trust, What are the types of theatre stages and auditoria? <http://www.theatrust.org.uk/>

²⁵ Glow, H., Johanson, K, “The problem with permanence is that you are stuck with it”: the public arts centre building in the twenty first century”, International Journal of Cultural Policy, February 2017.

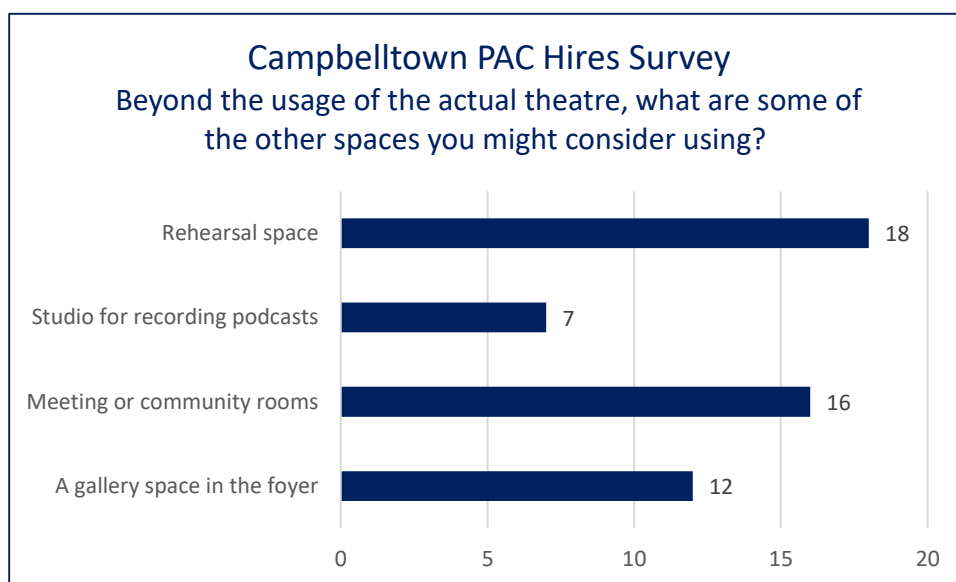
some capacity for bar and/or café service and can be used as a gallery space will maximise the usage and vibrancy of the PAC.

The full extent of these facilities can be determined when the size of the auditorium is understood and when the dimensions of the site are known.

Key Finding: A proscenium arch theatre with a combination of fixed raked seating and retractable seating is recommended

A multi-use rehearsal space

Particularly important is a large multi-use area that can be used as either as a rehearsal space, an easy to use second venue, or a very large dressing room for performances put on by schools and dance schools which will have a large number of students back stage waiting to come onto stage for their part of the performance.



This rehearsal room space should be at least as large as the main theatre stage with additional circulation space. This rehearsal space could be hired for meetings in a very simple manner – just with a lectern and stackable chairs and without the need for any technicians. It should have some very basic lighting and sound equipment to enable it to operate as and simple mini black box theatre to supplement the main stage which would be an easy-to-use and cheap-to-hire space for simple performances (such as comedy or music or some very intimate theatre) in a flat floor venue with stackable chairs.

Key Finding: A large rehearsal space that can also be used as large dressing room or a simple venue will be important to the success of the venue.

Separate studios for hire as part of a tuition centre

As was flagged in section 2 of this report on hirer demand, there will be considerable demand on the main theatre in the PAC from dance schools, dance competitions and other children’s performing arts training, such as Theatre Bugs, to present performances. These organisations are financed by tuition fees and will be full fee-paying clients.

Based on the analysis of dance participation rates, interviews with potential hirers and discussions undertaken with local dance school operators and other venue operators, this report considers there would be a strong level of demand for permanent bookings from these groups to provide lessons. However, a PAC cannot accept regular bookings unless there are dedicated spaces because a

permanent booking – for example in a rehearsal space on Thursdays from 6-10pm for lessons – would exclude other hirers who might be needing the rehearsal space for their shows.

One way of overcoming this would be to build dedicated studio spaces, either adjacent or incorporated into the PAC. Creating one or more studios for hire for dance, calisthenics and school usage would allow the regular hire of these spaces and maximise the utilisation of the venue and help to add activity and vibrancy. Studios could be used by state and private schools during the day to provide tuition (depend on a walkable location or the school transporting children) and after-hours by private children’s training organisations such as dance schools and children’s theatre companies. These activities would be mainly be for children but could equally be used for adult lessons or provide hireable rehearsal spaces for any community or professional users.

Incorporating tuition facilities into PACs as a means of driving activity and vitalising the precinct is a common feature of both large and small centres and perhaps most famously occurs with the Juillard School of Performing Arts at the Lincoln Centre in New York.

Dance schools are seeking competitive advantages with one another, and holding lessons in a studio linked to a full PAC would provide added prestige to the school. The ease of transitioning from rehearsal spaces to a main stage might also be appealing, particularly to younger students. These studios could be hired on full commercial rates to the existing dance schools in the Campbelltown area (six of whom responded to the Campbelltown PAC hirer’s survey), newly established schools or schools moving into the area. The Adelaide Theatre Academy (Home of Theatre bugs) indicated that the location would be very attractive as it would be conveniently located for their students and parents from locations from Salisbury to Magill. This would be true for a number of other children’s training companies and other performing arts organisations looking for hireable training and rehearsal spaces.

Building in additional studio capacity would be dependent on available land space and a separate market sounding and financial analysis would need to be undertaken to see whether the studio hire fees would cover the additional capital costs of constructing those studios. The concept would be for this part of the PAC to be financially self-sufficient and in the longer term become a profit centre to support other activities within the PAC. Care would need to be taken to ensure they are not moving from other council provided facilities. There would also be design challenges to ensure separate access and avoid noise seepage through different venues in the Centre

Key Finding: An incorporated or adjacent set of one or more studio facilities for permanent bookings should be examined depending on availability of land space. Incorporating studio spaces into the PAC would distinguish the Campbelltown venue from other suburban PACs in Adelaide and would help to create the critical mass of activity needed to keep the Centre vibrant.

Technical requirements

There are three main options to equip the theatre and spaces with appropriate technical equipment.

A venue can:

- Purchase its own modern equipment and maintain it. This will require specialist staffing, and an active management of the equipment roster to maintain current standards.
- Engage a specialist equipment supplier to lease the required technical equipment. A lease would include the option to upgrade equipment, and a maintenance schedule.
- Provide a basic lighting and sound rig with limited technical venue support. All hirers will need to provide their own equipment – often provided by a specialist equipment supplier.

Commercial producers with specific technical requirements (usually touring national and international acts) will tour their own technical equipment. They usually bring all of the required lighting, sound and AV to support their hire period. Smaller presenters may tour sound and AV but use the venues standard lighting rig.

Commercial presenters, dance schools, and independent hires would generally seek to use the venues standard equipment and then hire in any additional equipment they require.

Many community presenters are unlikely to have the required technical expertise or the budget to support sophisticated technical requirements – though they would likely seek to use any technical equipment supplied by the venue.

Venue self-programming presentations are limited by the available technical equipment and/or the budget to provide it. Venues participating in national arts touring are limited in their programming by the technical requirements of the touring production. Presenters can and do hire in additional equipment to support a specific tour but this gets expensive if the venue does not have appropriate stock of modern technical equipment.

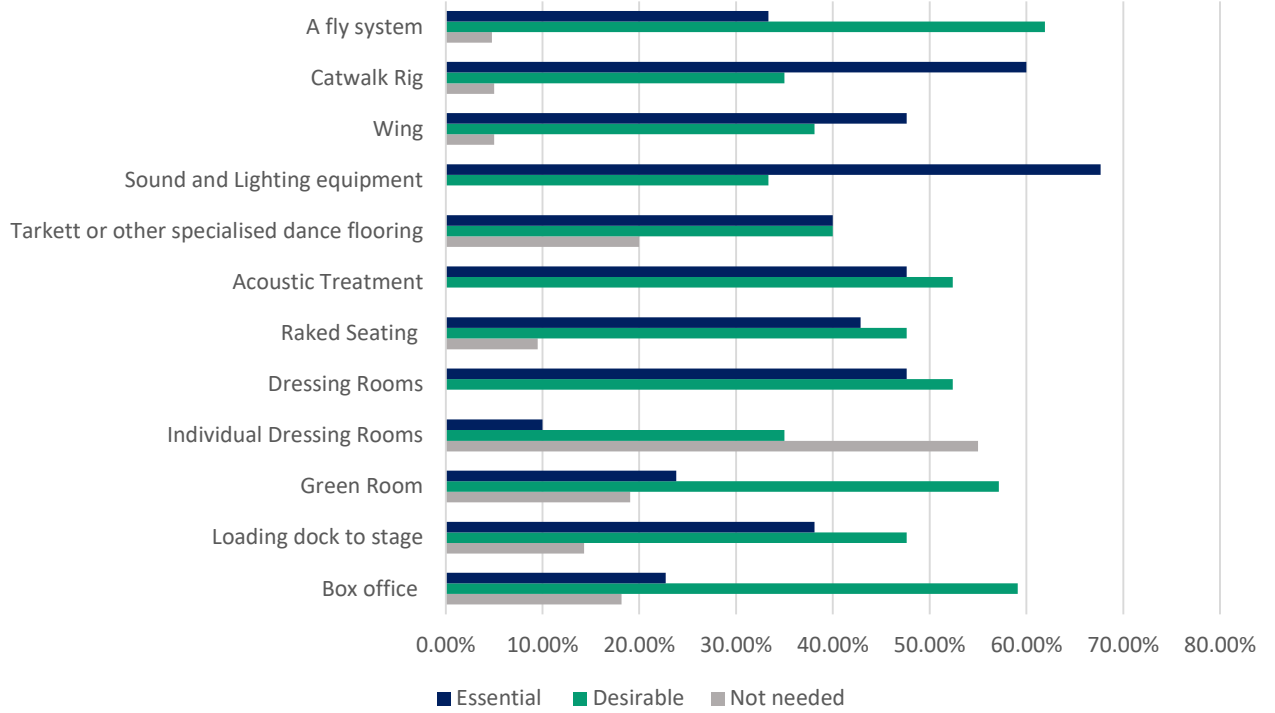
Once a concept design for the venues are prepared specialist equipment suppliers can advise the technical requirements and cost estimates.

Technical capacity recommendations

The Campbelltown local hirer survey demonstrated some essential requirements most notably that the venue should be self-sufficient in terms of light and sound, a catwalk rig, acoustic treatment, and dressing rooms. While individual dressing rooms were identified as not been needed by local hirers, at least one smaller dressing room which might service 1-4 people and could be used as an individual room is recommended, particularly if the Council choose to have a larger theatre as some professional hirers and performers might require it.

Campbelltown PAC Hirers Survey

How important would the following features be to your hiring/usage decision?



Inputs into an architectural schematic brief relating to the Theatre

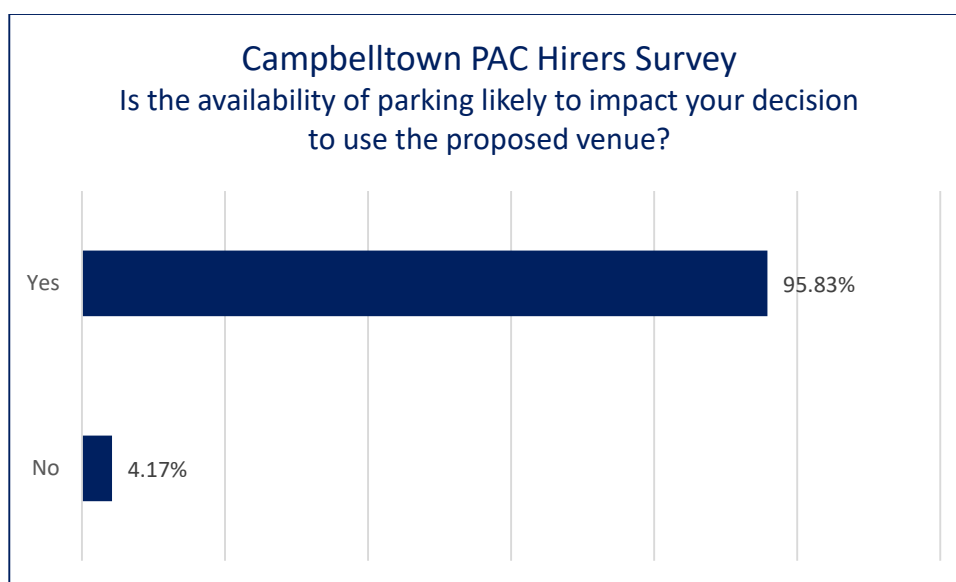
Building on the survey and consultations, previous work done by the Campbelltown City Council PAC working group the following list of technical and stage items is recommended as providing input into an. The depending on available budget

- 380 seat capacity for a local venue or 500 if the CCC choose to pursue a regional level venue.
- A proscenium arch theatre with a combination of fixed raked seating and retractable seating to enable some flexible performances such as Cabaret but also provide the comfort and grandeur of a traditional fixed, raked seated venue.
- A level of equipment that is sufficient to enable most local and community users to hire the venue without the need for hiring any additional equipment.
- A fixed stage position and ideally one that can be raised or flat to accommodate different users.
- Large stage for dance schools and school performances.
- Large wings and cross over space also required for dance schools and other children's performances.
- Acoustic treatments.
- Easily accessible loading dock.
- Sprung floor and other specialist dance flooring, like Tarkett, which is removable.
- A large rehearsal space that can also be used as simple venue and a larger dressing room will be important to the success of the venue.
- Other rooms for hirers and community use which can be used as meeting rooms and potentially also used as additional dressing rooms or as a green room should also be incorporated into the design
- An outdoor space for events.
- A foyer that serves as a usable gallery space.
- A box office.
- Ample storage.
- ESD (Environmental Sustainable Design) Principles and a five star Greenstar rating.
- A fly system as a "nice to have" which can expand the range of shows and provide performers with flexibility but it is an expensive item and can make the theatre more expensive to hire. The PAC should aim to have a fly system if it can be provided within budget. There might be technical solutions to a full fly – a partial fly off a rig if there is sufficient height.
- Orchestra pits were seen as a necessary item in the community consultation of local operators, particularly for the community theatre groups performing musicals. However, in professional usage for musicals, orchestra pits are increasingly being replaced with studios which can live stream music and orchestra pits are mainly reserved for classical art forms like opera and ballet, neither of which are likely to be performed in Campbelltown. Whilst community theatre groups find studios hard to use, the reality is that orchestra pits are expensive and most venues reported are rarely used. A small studio for the orchestra to live stream music for performances is the recommended option. This studio might be used for other purposes outside of performances such as and for recording podcasts
- Examine the possibility of incorporating one or more studios to hire for tuition purposes to schools and other hirers to create additional activity and potentially provide additional income.

Location and other needs

Based on consultation with other Adelaide suburban venues the following items area also considered important.

- A location that is accessible and can generate a community hub feeling.
- Co-location with some other activity to increase efficiency of staffing model and to maximise on-site activity.
- A number of successful venues are located near a shopping centre to benefit from overflow parking, and a widely known and recognisable location
- A kitchen is important to support cultural events if these are considered core business for the council.
- A café is an important patron service but is unlikely to be a profit centre
- Parking is essential. This was re-iterated by all Adelaide suburban venues and was emphasised in the Campbelltown PAC Hirers survey.



Analysis and recommendations

The key findings of section 4 on Theatre size and style are as follows:

- The venue should be designed to meet requirements. Flexibility is important but theatre quality should be prioritised.
- If Campbelltown Council are keen to have a regional centre style venue, akin to the Art House in Wyong, 450-500 seats should be considered for the main stage venue. If a more local venue is under consideration, a venue of around 350-380 would still be small enough to accommodate most users but large enough to be attractive to dance schools and competitions.
- A black box theatre is not recommended as local hirers find it difficult to use and generally unappealing.
- A proscenium arch theatre with a combination of fixed raked seating and retractable seating is recommended.
- Additional and secondary spaces, particularly a large rehearsal space that can also be used as simple venue and a larger dressing room will be important to the success of the venue.
- The venue should be self-sufficient in terms of basic light and sound equipment.
- Co-location with other activities or services is essential to ensure efficiencies of service delivery and generate additional activity.
- Parking is essential.

5. CAPITAL COSTS

This section aims to provide an indicative capital cost through precedent example. This only provides a rough guide to help the Campbelltown Council progress its decision making. It is provided in the absence of a design and site which can be more accurately costed by a Quantity Surveyor.

There are a number of qualifications that need to be considered.

- The number of PACs built in Australia remains limited so it is difficult to establish patterns or trends with any certainty.
- Every site is different and will have its own challenges (space restrictions, soil contamination, demolition costs).
- Cost is not linear in proportion to size – i.e. a 500 seat theatre is not necessarily double a 250 seat theatre. There are economies of scale. However certain features such as the requirement of a second tier of seating will add considerable cost.
- Different elements can be costed and choices made through a value management process – e.g. extra spaces for rehearsal or a fly system or an orchestra pit.
- Escalation costs are considerable and have not been factored in as construction date is currently unknown.
- Cost can escalate quickly with additional features.

Key Finding: Based on these precedent examples a capital cost of between \$22-\$30 million (excluding escalation) should be anticipated depending on size of the venue and the number of auxiliary spaces.

Precedent Venues		
Examples under current consideration		
Venue	Capital Cost	Description
Busselton Performing Arts and Convention Centre Planned Opening 2023	\$28.5 million Australian Government \$10.35 million (Regional Growth Fund) Loan Borrowings \$15 million Sale of Mitchell Park Library Site \$3.15 million	<ul style="list-style-type: none"> A flexible indoor events space with capacity for over 1000 people 625 two tier seat auditorium with 343 retractable seats, 152 fixed dress circle seats over two levels Separate conferencing break out rooms with capacity to seat over 400 people in a banquet dining style layout with views to Geographe Bay
Victor Harbour Under consideration	\$24.4 million	<ul style="list-style-type: none"> 343 Seat proscenium theatre Fly system 168 seat flexi theatre Gallery space – 90 metres 4 small Cinemas (redeveloped)
Large Theatres 600-1000 seats		
Cairns Performing Arts Centre	\$53 million	A highly regarded council run PAC in a major regional centre which includes: <ul style="list-style-type: none"> 940 seat auditorium with balcony, fly tower and orchestra pit Studio theatre with a 400 seat capacity

Completed Nov 2018		<ul style="list-style-type: none"> • Foyer, bar and amenities, including covered external terrace. • Function space and back of house facilities which include dressing rooms, a green room, loading and technical support spaces.
Whitehorse Centre (Metro Melbourne) Box Hill Ringwood Late 2023	\$68 million for PAC \$10 million for multideck carpark	<p>Council built and run centre</p> <ul style="list-style-type: none"> • 600-seat auditorium with larger stage and modern back stage area • 200-seat studio theatre enabling smaller scale works • Multipurpose rehearsal/dance studio • Multipurpose function room • Improved soundshell capability for community festival season • Multi-deck car park to accommodate visitors to the Whitehorse Centre, Nunawading Library, Whitehorse Civic Centre and the Walker Park sports precinct
Tamworth Construction 2022 -2025	\$128 million	<ul style="list-style-type: none"> • The proposed components of the new Tamworth Performing Arts Centre and Cultural Precinct (TPAC) are: • 600 seat Proscenium Theatre with full flying capability • 200 seat variable format Studio Theatre • 100 seat Salon recital room • 200 person functions/banquet centre • 30 person Meeting Room • Rehearsal / Dance Studio to match main stage • Recording Studio • 150 person café • Tamworth Regional Conservatorium of Music • ABC Studios New England North West, Tamworth • Expansion to the adjacent Library and Art Gallery • All associated administration, back-of-house and support
LaTrobe Creative Precinct Construction started 2019 (operational late 2021)	\$38.5 Latrobe CC - \$18.5m Fed Gov - \$10m State Gov \$10m	<p>The Latrobe valley is a large regional centre 175 km from Melbourne. The venue is set to open shortly and will include:</p> <ul style="list-style-type: none"> • A 750 seat, two tier theatre within a new performing arts centre; • Fly system • Multipurpose/Meeting rooms; • An indoor/outdoor café; and • Two open air event spaces, one of which is an amphitheatre
St Leonards College (Melbourne) Completed 2020	Approx. \$25 mill	<ul style="list-style-type: none"> • 600-seat shoe box stand-alone performing arts facility. It's a purpose-built, technologically contemporary venue for St Leonard's to host theatrical and musical performance • Last seats 28 meters from stage
400 Seat Venues		
Goulburn Performing Arts Centre 2022	\$18.95m. (Includes retaining historical façade (old town hall))	<ul style="list-style-type: none"> • 400 two-tiered seated performing arts centre complete with a comprehensive Back Of House (including Stage, Fly Towers, Control Rooms, Follow Spots, Change Rooms, Green Room, Travelling Offices, etc.)
Concert Hall - Brighton HS Performing Arts Centre 2014	\$18 million for concert hall	<ul style="list-style-type: none"> • 400 seat Recital Hall is an adjunct to the existing Performing Arts Centre and provides a venue with new amenities. • This double storey volume is surrounded by a foyer/lounge, offices, servery, public toilets, marshalling area, back of house and services
The Art House Wyong	\$12.7 million	<ul style="list-style-type: none"> • 500 seat proscenium arch auditorium with fly system and fixed raked seating

(Central Coast NSW) 2016		<ul style="list-style-type: none"> • 130 seat studio • Foyer Gallery space • Meeting and conference rooms
<p>Sources Latrobe Creative Precinct Latrobe City Council faqs_whc_redevelopment_final.pdf (whitehorse.vic.gov.au) Rob Gebert Arts Consultancy (October 2019) Tamworth Performing Arts Centre and Cultural Precinct Business Case William Ross Architects, Whitehorse Centre Business Case, Part C: Community Consultation Final October 2015 Cairns Performing Arts Centre website Randall Arts Management, Victor Harbor Business Case Further Development – April 2021 Central Coast Gosford Express April 28, 2016. Goulburn Mulwaree Council website City of Busselton DRAFT Busselton Performing, Arts and Convention Centre BPACC Business Plan 2020-2025 Version 5 Daily Telegraph, “You never know who you might see treading the boards at The Art House at Wyong”, April 28, 2016. Discussion with ARM Architects (+website)</p>		

A fly tower was added at Goulbourn at an additional cost of \$450,000 ([Construction to begin on Performing Arts Centre Goulburn Mulwaree Council \(nsw.gov.au\)](#))

Analysis and recommendations

The key finding of Section 5 on the potential capital costs are as follows.

- A capital cost of between \$22-30 million (excluding escalation) should be anticipated.

6. OPERATING AND GOVERNANCE MODELS

This section considers ownership models as well as governance and operating models. It concludes by providing some indicative operating costs.

The Campbelltown City Council would remain the owner or co-owner of the venue in all scenarios.

Joint Venture or share use arrangement

One option is building and/or owning and operating a venue in a joint venture with an education institution. This would most likely occur with the Department of Education or with a private college. For a state school it would need to be either the Charles Campbell College or the proposed new school on the Norwood Morialta middle school campus in Rostrevor.

This section of the study is informed by:

- A consultation with Deb O'Reilly, Director New Schools, Infrastructure Branch, Department of Education
- A visit to the Theatre at St Ignatius college,
- A visit to the Golden Grove Arts Centre which is a joint venture with four adjoining schools
- Input in the broader consultations from hirers experience with booking school venues.

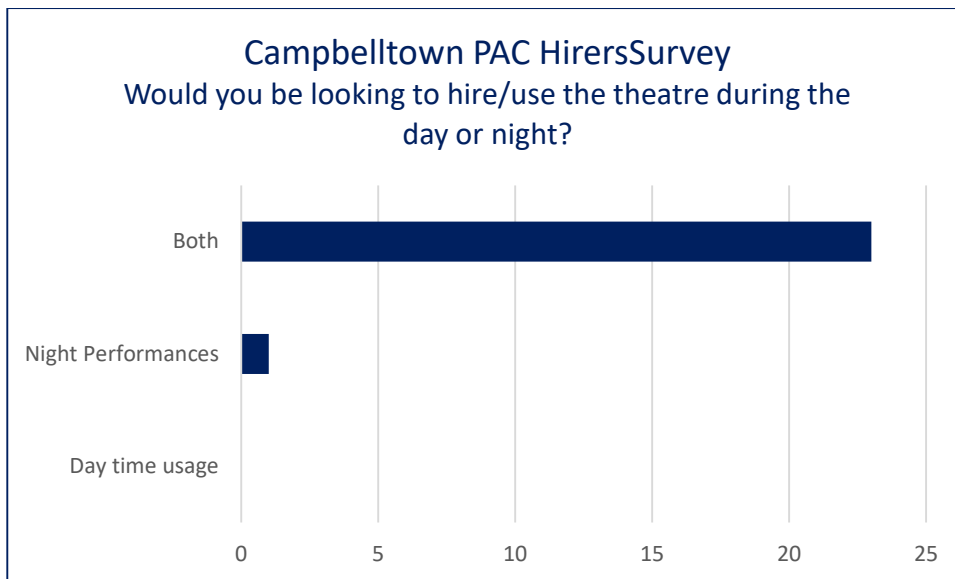
The benefits of a joint venture include:

- Most cost effective to build as costs are shared
- Most cost effective to operate as costs are shared
- Guarantees high level of usage
- Benefit to school is high
- Provides a service to local community – only in so far as it provides a service to the students of the school and assumes that pupils are residents of the Campbelltown City Council. However, a significant portion of the students are likely not to be Campbelltown City Council residents as the school zone is likely to extend beyond the Campbelltown boundary and in addition up to half the students might be from out of zone enrolments. Based on 2018 figures, 47 per cent of students at the state's zoned public high schools live outside school zone boundaries.²⁶

The major disadvantage of a joint venture is that school usage significantly limits the ability of external hirers to use the PAC. The school would expect to have priority usage of the theatre between 8.30 and 4.00 every day of the week for the 40 weeks a year school sits. This makes it very difficult to accommodate other users. It leaves only ten weeks of totally free usage which includes the two or three weeks of Christmas and Easter which are extremely quiet periods for the performing arts.

Many other hirers are also seeking day time usage. In fact, the Campbelltown PAC Hirers Survey found that the majority of local users would be seeking both day time and night time usage.

²⁶ ABC News Online, "Almost half of Adelaide public high school students live outside their zone" Updated 24 Jul 2019.



The importance of day time usage was re-iterated by the Marion Cultural Centre which is more heavily used during the day. The range of commercial shows which might play in a suburban theatre are also likely to occur both during the day and at night – this includes matinee performances targeting older patrons and children’s programming for pre-schoolers.

The school’s day time usage also curtails some potential night usage. Other hirers can only really use it after 4 pm when students have left – to comply with rules and regulations around interaction of school students and outside hirers. This makes it hard to set up and rehearse before an evening performance. It also excludes shows which play over many nights and need the stage to remain set. This can partially be overcome if the venue can be accessed without entering the school – such as the Barossa Cultural Centre at Faith College in Tanunda. Yet even here, external hirers consulted have found it so difficult to find a time slot in the venue that they stopped trying.

In the case of St Ignatius College, there is a school usage first usage policy which means the school reserves the right to over-rule pre-existing hire arrangements should the need arise. This policy makes it very hard for any other hirer to use the venue as it puts at risk the staging, publicity and marketing costs.

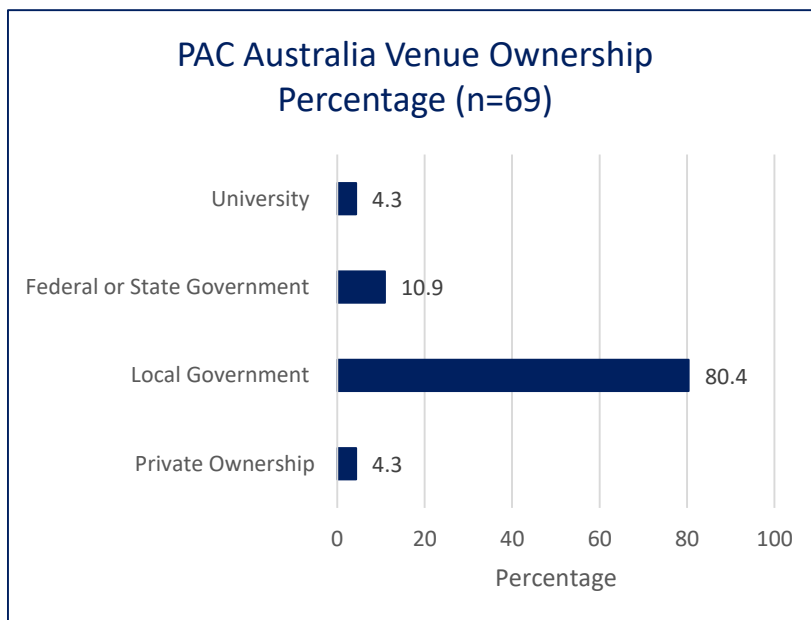
A joint venture which is based on joint usage agreement where the council own and run the venue but have a usage agreement with a school or the Department of Education would be more effective in providing a service to a school and retaining ease of access for other hirers.

This is not to exclude a joint venture with a school, but the Council should ensure that the majority of costs are met by the School and attempt to maximise the non-school usage of the main stage, particularly on Thursdays and Fridays which are likely to be high demand nights.

Key Finding: A joint venture with a school will limit access to the venue for other hirers and will limit community benefit.

Governance models

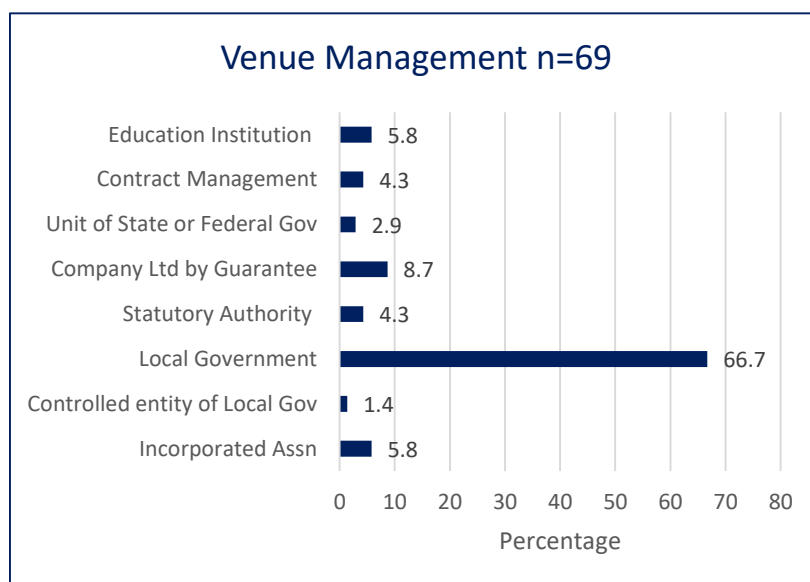
The majority of PACs in Australia are local government owned. State Governments run the major city performing arts centres. A very small number are owned by educational facilities and or are privately owned centres which are either boutique, philanthropically driven venues like the Ukaria Cultural Centre or large commercial theatres like the Capitol Theatre and Sydney Lyric owned by Stephen Found or the Princess, the Regent and the Forum in Melbourne owned and operated by the Marriner Group. There is unlikely to be much interest in a capital investment from the private sector in a theatre in Campbelltown due to the location and the size of the venue.



There are numerous operating and governance options practised in Australia.

A number of these models are not suitable or possible for a council owned venue. The four main governance models which Campbelltown City Council might consider are:

- Direct council control
- An at “arm’s length” board structure
- Contract management
- A resident company management.



Direct Council control

Direct council control is by far the most common option for council owned venues. The venue is run by council employees and the operations of the venue are integrated into the operations of the council. It can be quite efficient as it can rely on existing council resources for administrative functions such as IT and finance. Staff can also be used across multiple functions which is particularly relevant if the PAC is integrated into another council function.

A clear line of control to Elected Members is advantageous in promoting the Council’s agenda but can lead to political interference into operational and programming decisions.

A Board Structure

An at arms-length governance structure with an independent board which provides a degree of operating independence and artistic autonomy is common in larger venues, and is common place for larger state and council cultural institutions.

This is a tried-and-true governance model which provides the autonomy needed to act in a commercial and agile manner in what is in part a commercial market. For example, the PAC might need to negotiate profit and risk share arrangements with performers and producers for individual shows or as part of a tour. These require fast and agile responses and a high degree of autonomy in decision making.

This would be a more nimble organisation with better connections to performing arts industry. Depending on the actual structure it might be eligible for a broader range of grants from philanthropic bodies and Federal Government. A Board is also a good model to bring in external expertise and connections.

An at arms-length board structure could be achieved through a Company limited by Guarantee, or an incorporated association.

Contract Management

The venue could be managed under contract either by a private operator or a Not-for-Profit provider. The benefit would be it might enable a larger scale private operator to leverage their existing touring networks. This might be more dynamic than a council run operation which is only running a single venue. The downside would be the difficulty in contracting social benefit and public purpose outcomes in a manner that does not inhibit the operations but does guarantee good outcomes.

Contract Management through the private sector is extremely rare in Australian performing arts centres. It occurs at the Concourse at Chatswood in Sydney which is a venue with a 1,000 seat concert hall and a 500 seat theatre and a large convention space owned by the Willoughby City Council. The Concourse Chatswood is run under contract management by Century Venues which run a number of venues in Sydney in addition to the Concourse (Enmore Theatre, Metro, Factory Theatre, Comedy Store and the Manning Bar at Sydney Uni) and an artist management company.

The possibility of private contract management was raised with GWB in Adelaide and the advice was that a single venue is unlikely to be an appealing proposition for a private operator who would really require a network of venues to generate the touring possibilities and economies of scale required.

It is unlikely that there would be much interest from competent private sector operators to run a single suburban venue in Adelaide. However, limited market sounding has been undertaken to test this assumption and it is a possibility that could be considered in the future.

The Parks Community Centre is under contract management with a not-for-profit organisation, the YMCA. The YMCA is not a performing arts specialist and the theatre venues at the Parks are underutilised with a program limited to school holiday workshops and the occasional local performers through Out of the Square consortium. The YMCA were approached as part of this study but did not engage. This is not a recommended model.

Venue Managed by resident company

This would see a performing arts company both use the venue and act as a venue manager. An example of this the renowned Merrigong Theatre Company which is an independent not-for-profit

company that operates Wollongong’s premier performing arts venue, Illawarra Performing Arts Centre (IPAC).

This model is particularly effective at fostering the arts in the community and providing a pathway for local artists into professional pathways.

It is however, unlikely to effective in Adelaide for two main reasons:

- It would be hard to find a company willing to re-locate into suburban Adelaide
- A company managing a venue tend to monopolise the venue and a lot of venue usage is dedicated to rehearsing which does not draw an audience to the venue and can exclude other users.

Analysis and recommendations

Summary of different venue management options			
Structure	Pros	Cons	Recommendation
Direct Council Control	<ul style="list-style-type: none"> • Efficient as it can rely on existing council resources – IT and finance etc • Staff can be used across multiple function • Clear line of control to Elected Officials • Easier to respond to direct community needs raised with Elected Members 	<ul style="list-style-type: none"> • Restrictive council operating environment 	Recommended for smaller venue
Board of Management	<ul style="list-style-type: none"> • Provides capacity to function commercially in a commercial market • Draws in external expertise • Artistic independence • Free from interference from Elected Members on content decisions 	<ul style="list-style-type: none"> • Additional operating costs of supporting board and independent professional staff 	Recommended for larger (500 seat) venue
Contract Management	<ul style="list-style-type: none"> • Removes council from operating burdens • Draws in external expertise and broader connections 	<ul style="list-style-type: none"> • There are very few commercial contracts for PACs • Examples of NFP contracts in the Adelaide market are also limited and not successful at generating content 	Limited viable options and not recommended
Venue Managed by Resident Arts Group	<ul style="list-style-type: none"> • Grows local arts community 	<ul style="list-style-type: none"> • The resident group often comes to monopolise the venue for rehearsals. See for example Scott Theatre – no longer much used as it is primarily a lecture theatre. • Little Theatre run by Theatre Guild – limited outside usage. 	Not recommended

7. POTENTIAL OPERATING COSTS

Ascertaining the operating costs for council owned venues is difficult because most councils do not report the operations of their PACs directly. The financial data is integrated into the broader financial reporting of the Council.

A number of different sources were used to estimate the likely operating costs. These include:

- industry knowledge
- newspaper reporting of the \$200,000 a year subsidy to the Hopgood Noarlunga Theatre
- some limited council reporting (See the Art House in Wyong)
- consultations with venue operators
- The PAC Australia (2020) 2019 Economic Activity Report, which surveys venue operators. See full tables in Appendix 1.

All performing arts centres will have commercial revenue sources such as: box office ticketing services, venue hire, recoverables (fees such as cleaning and utilities passed on to hirers), food & beverage and possibly merchandise. These commercial activities will underpin the public purpose activities and will cover some of the operational costs, but ongoing support will still be needed.

However, performing arts centres seeking to make a public purpose contribution will still require a financial operating subsidy. The only commercially profitable theatres are large music venues with high capacities and large – 1500 + commercial theatres such as the Princess in Melbourne or the Capitol Theatre in Sydney or very basic venues for hire with minimal maintenance requirements and undertaking no community programming or public purpose activities.

A number of venues spoke about operating on a break-even basis but this was largely related to breaking even on programming once wages for venue staff had been paid by the Council. Staff are needed to program the venue, provide marketing and publicity, undertake administrative tasks such as taking bookings and tours, box office and there are requirements for technical staff to run the venue.

In relation to local government subsidies paid, larger capacity, more active venues will generate more income but also have higher operating costs (largely relating to the style of programming). The venues in the table below are unidentified for commercial in confidence reasons, but based on the turnover and the level of local government subsidy are all almost certainly local government owned venues. Based on the earned income levels, the 0-1 million turnover venues are likely to be smaller venues.

Level of local government subsidy by venue size based on turnover (Actuals)				
Size (by turnover)	Sample size	Earned Income	LG annual subsidy	LG Subsidy as percentage of income
\$0 – 1m	13	\$267,051	\$201,000	37.59%
\$1 -2m	8	\$845,589	\$1,114,000	54.72%
\$2-5 m	20	\$1,918,099	\$972,000	32.47%
PAC Australia (2020) 2019 Economic Activity Report				

The staffing arrangements at the venues consulted were as follows:

Golden Grove Arts Centre

- Direct Council control
- All staff council employees
 - 1 Facility Manager – Arts and Rec side + other duties
 - 1 Arts Lead
 - 1 FTE – technician
 - Pool of casuals through employment agency RANDSTAD
- Council employees are part of a larger budget line
- Endeavours to run events on a break-even basis after staff costs are accounted for.

Hopgood Theatre Noarlunga

Run by Country Arts SA. Current discussions about Onkaparinga Council taking over the venue

Operated in conjunction with 4 other theatres – hard to isolate financial information but for Noarlunga it is approximately:

- 1 FTE theatre manager
- 2 FTE admin
- 1 FTE technician (+casual pool for tech + FOH)

Shedley Theatre Playford

- Direct Council control
- Quite aggressive programming approach.
- Aim to break even on events
- Staffing:
 - 1 FTE Manager Civic Venues
 - 1 FTE Box office/ Secretarial
 - 1 FTE Marketing
 - 1 FTE Technician
 - Casual Pool

Marion Cultural Centre

- Direct Council control
- Quite aggressive programming approach.
- Aim to break even on events
- Staffing:
 - 1 FTE Unit Manager Cultural Facilities (Has other responsibilities too)
 - 1 FTE Venue hire
 - 1 FTE Marketing/Promotion/Tickets/Social Media
 - 1.5 FTE Technicians
 - Casual Pool

The Art House Wyong

- An independent not-for-profit entity with an independent board of directors. Technically it is a Company Limited by Guarantee with Central Coast Council as the only member
- Staffing:

- Approximately 8 FTE
- Executive Director
- Venue Services Manager
- Production and Operations Manager
- Education Coordinator
- Marketing and Box Office Assistant
- Marketing and Box Office Coordinator
- Cafe Manager
- Technical Supervisor
- Pool of casuals

Analysis and recommendations

The key finding of Section 7 on the potential operating costs are as follows.

- Based on consultations with local Adelaide venues and on budget actuals reported through PAC Australia Economic Report 2019, operating subsidies paid by local government to venues range from between \$250,000 a year for smaller venues of between 300-380 seats and extend up to \$1 million a year for a larger venues.

8. NEXT STEPS

This section walks through what some of the next steps might be if CCC choose to proceed with further consideration and planning for a PAC.

Potential Funding Sources

A number of performing arts venues outlined in the capital cost section of this report were successful in obtaining Federal and State funding for upfront capital costs for construction. CCC itself has had success in obtaining Federal and State funds for community investments, such as the ARC sport and recreation centre.

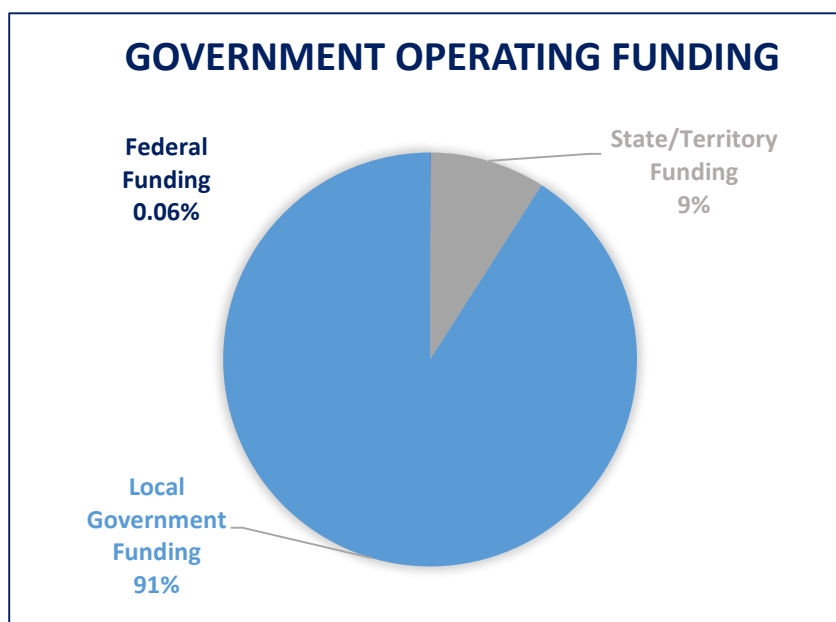
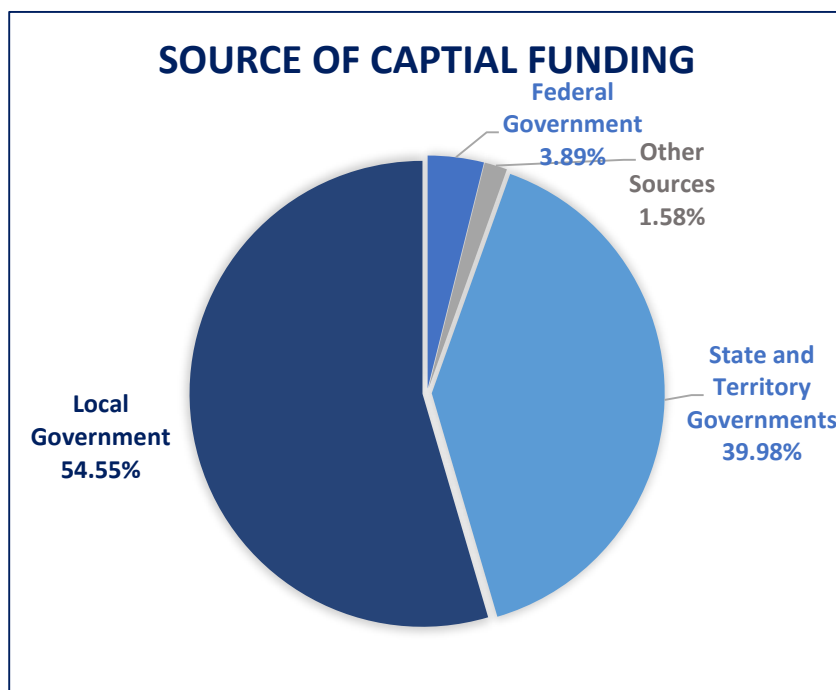
There is no guarantee of receiving this investment which is most likely to come through an election process. In terms of on-going federal government support for capital funding to help maintain facilities or for ongoing upgrades, the chances of obtaining federal government funding are small. The high level of State and Territory funding in this graph would reflect those governments' commitment to their own venues. There are a number of local and state government supported venues in Australia, such as the Riverbank Theatre in Parramatta, but there are none in South Australia.

Federal government funding for operation costs is virtually non-existent at just 0.06%

Source PAC Australia, Economic Report 2019, p.35 (49 Respondents)

Federal Opportunities

Federal funding in the arts is primarily for artists. The PAC might obtain funding for its program development if that includes financing a production (likely to be in partnership with a company) which would play in the venue and then hopefully tour to other venues in SA and ideally nationally or even internationally. This is unlikely to be a net contributor to the finances of the centre.



- Opportunities for federal arts funding are through The Department for Infrastructure, Transport, Regional Development and Communications which includes The Office for the Arts. <https://www.arts.gov.au/>
- With further arts programs run by the Australia Council for the Arts <https://www.australiacouncil.gov.au/funding/>
- Federal arts funding is currently focused on COVID recovery strategies for the performing arts sector.
- The Department of Transport, Regional Development and Communications grant program features several opportunities to partner with communities and artists. <https://www.arts.gov.au/>
- The Community Heritage Grants program aims to preserve and provide access to locally held, nationally significant cultural heritage collections across Australia. Not-for-profit community organisations such as historical societies, museums, public libraries, archives, galleries and Indigenous and migrant community groups can apply. <https://www.arts.gov.au/departmental-news/community-heritage-grants-available>
- Live Music Australia Supporting venues to host live Australian music. Noting that the City of Playford's – Northern Sound System program was a recent grant recipient.
- The Live Music Australia program is a competitive grants opportunity for small to medium sized venues that support quality original Australian live music. The first year of funding in 2020–21 includes support for activities that assist live music venues to become operational following the impacts of COVID-19 on the industry. The Live Music Australia program is focused on supporting small to medium venues that stage quality original Australian live music. Businesses can be located anywhere in Australia, including suburban, regional and remote regions. https://www.arts.gov.au/search?search_api_views_fulltext=Live+Music+Australia
- Australia Council for the Arts also provide opportunities to work directly with communities and artists to apply for funding for specific projects. The key issue is that funding is directed to support the community or artist with the venue / council program contributing in the form of in-kind or cash support.
- Australia Council programs are highly contested and have a deliberate focus on professional arts practice. Including programs for emerging and established artists, First Nations Artists both performing and visual. <https://www.australiacouncil.gov.au/>
- Playing Australia is a critical fund that supports the touring of professional performing arts across Australia.
- The Regional Performing Arts Touring program (Playing Australia) supports performing arts to reach regional and remote communities across Australia. Grants are available to support the net touring and other designated costs associated with tours. There is no limit on the amount that can be requested. <https://www.australiacouncil.gov.au/funding/funding-index/playing-australia-regional-performing-arts-touring-fund/>

South Australian Funding Opportunities

Opportunities exist to work directly with communities and artists to apply for funding for specific projects. The key issue is that funding is directed to support the community or artist with the venue / council program contributing in the form of in-kind or cash support.

A central list of SA Government Grants can be found at <https://www.sa.gov.au/topics/care-and-support/concessions-and-grants/grants>. Various government departments also run funding opportunities including; The Office of Recreation, Sport and Racing, Grants SA – DHS, Wellbeing SA, and Arts SA.

- Arts SA Project Funding rounds for performing arts and visual arts
<https://www.dpc.sa.gov.au/responsibilities/arts-and-culture/grants>
- Office Recreation Sport and Racing – active recreation programs funding e.g. Game On Partnership funding https://www.orsr.sa.gov.au/funding/apply_for_funding
- WellbeingSA, Community Wellbeing Hubs and Community Wellbeing and Resilience Projects
<https://openyourworld.sa.gov.au/>
- Grants SA <https://www.australiacouncil.gov.au/funding/>
- Australia Council for the Arts project rounds for performing arts and visual arts
<https://www.australiacouncil.gov.au/funding/>
- *The Funding Centre* is an initiative of Our community <https://www.fundingcentre.com.au/>
- Our community is the engine room for creating and disseminating practical, affordable training, leadership, and technological solutions that allow not-for-profit and grant making organisations to get on with the crucial work of building stronger communities
<https://www.ourcommunity.com.au/>
- *Office for Recreation, Sport and Racing's* Game On Partnerships that will support projects that align with Game On: Getting South Australians moving by addressing issues and barriers and/or capitalising on opportunities to increasing participation in physical activity.
- Arts SA's arts grants programs provide opportunities for venues as presenters and producers to partner with SA artists and arts companies. Spanning art forms and areas of practice, funding supports professional artists and arts organisations to develop, make work and engage with audiences. Local government and state government agencies and for-profit arts and cultural organisations are eligible applicants in some grant categories.

Additional Funding Sources

Important resources to track the opportunities include The Funding Centre which is an initiative of Our community - <https://www.fundingcentre.com.au/> and Philanthropy Australia's Fund Seeker program - <https://www.philanthropy.org.au/seek-funding/>.

While all venues should seek private sources of funding such as sponsorship, funds from philanthropic trusts, non-government grants and donations remain very small for smaller, predominantly local government run venues.

Private (non-operating) revenue sources for Performing Arts Centres				
	Venues with turnover up to \$1 m sample number 13		Venues with turnover \$1m-2m sample number 8	
	Percentage of income	Average	Percentage of income	Average
Philanthropic Trusts	0.00%	\$0.00	0.06%	\$1,250.00
Sponsorship (monetary)	2.20%	\$11,778.46	0.61%	\$12,797.25
Sponsorship (in-kind)	0.00%	\$0.00	0.00%	\$0.00
Donations/Fundraising	0.00%	\$11.08	0.03%	\$537.50
Non-government grants	0.13%	\$692.31	0.27%	\$5,625.00
Sub-total Private Support	2.33%	\$12,481.85	0.97%	\$20,209.75

Commercial possibilities

Based on consultations with four suburban venues and PAC Australia figures, commercial opportunities for a venue this size are likely to be limited. The limitations of conferencing are covered in a previous section. Based on Adelaide venues, cafes in small venues are likely to be loss centres rather than profit centres. A café which can be operated by the venue or by the hirer which serves drinks and basic snacks should be included as a patron service but not in the anticipation that it would raise revenue. Hiring commercial retail space to a specialist compatible provider, for example an arts supply shop or a shop specialising in dance equipment, is a possibility but this is a very specialised market and it may be difficult to find a provider and an arrangement that is profitable for CCC. A more open retail opportunity, such as a service provider business of some type, might have some financial merit but will require CCC to enter into commercial leasing arrangements for a council owned property.

Private (non-operating) revenue sources for Performing Arts Centres				
	Venues with turnover up to \$1 m sample number 13		Venues with turnover \$1m-2m sample number 8	
	Percentage of income	Average	Percentage of income	Average
Other earned income (non theatrical related)	3.74%	\$20,032.23	3.74%	\$73,451.13

Resources Available for Local Government

Venues, whether performing arts centres, museums or galleries do not operate in isolation but rather form part of local, national and international networks.

There are a number of performing arts centres associations which are membership based and provide resource tools (i.e technical specifications and requirements), workshops, professional development, advocacy and very importantly the presentation of local and touring performances. Being on a local and national circuit will be pivotal to ensuring a high usage of the venue.

The various state PAC Associations provide helpful guidance on industry best practise, audience surveys, media templates and other useful information that would help with planning a running a new PAC. PAC Australia and VAPAC - The Victorian Association of Performing Arts Centres both produce benchmarking references which provide current information on industry standards including salaries, venue charges, staffing levels, staff charge out rates and industry expectations. These resources would be helpful in the design phase and in undertaking the financial modelling once concept plans have been developed.

Membership of the South Australian Presenters Association would be beneficial in helping with programming and forming connections and partnerships with other venues.

Arts and Cultural Plan

A venue is only the platform for the activity that occurs in a PAC. It is the hardware so to speak but the software needs to be developed. Developing an arts and cultural plan would be a good manner of

ensuring the new infrastructure asset would be most effectively leveraged to help foster and promote the arts and culture across the Council area, and not just in a building.

While there is demand from performers and users and a large and growing audience for the performing arts, it will still be difficult to establish an audience for a new venue. Building a program and building an audience is difficult and needs support.

A Venue manager should be hired before the venue opens or construction begins to help influence the design and start the process of building a program and an audience for the Centre. The public needs to become accustomed to going to the Campbelltown PAC. The PAC would need an effective plan for:

- Marketing and building social media presence
- Building awareness of the venue
- Audience development
- Community engagement, particularly in developing relationships with communities less likely to attend such as First Nations and CALD communities
- Effective audience research to understand local demand.

Design Work, Business Case and Options Analysis

Once conceptual designs and QS costing have been developed, the next phase of work might include undertaking a comprehensive business case to undertaking a financial, social and economic analysis of the different options which would include building a financial model for each option.

This business case would build on the work undertaken in this study but would be a much larger piece of work. It should also require the development of concept plans which can be costed in order to undertake a more thorough examination of the proposal.

Analysis and recommendations

The key finding of Section 8 on the next are as follows.

- Some external funding might be available through State and Federal Governments to assist with capital costs.
- External government funding for operations will be limited to program support.
- External non-government funding will be limited.
- Commercial possibilities will be limited.
- The development of an Arts and Cultural Plan would ensure any benefit derived from the proposed PAC would be felt council wide, even by those who do not attend the venue.
- Joining membership-based PAC and presenter associations would be beneficial in the design and planning phases.
- Additional financial analysis will be required following the completion of concept plans with can be costed and provide more accurate running costs.

9. FINDINGS

A new PAC in Campbelltown would deliver considerable social and economic benefits to the local community. It would be in line with local government practice around Australia and there are many examples of how such PACs are run successfully. This study has found that if it was well run, it would be highly utilised and would provide a valuable asset to the Campbelltown community. It would create a central community hub and change the general perception of Campbelltown as well as how locals view themselves.

A PAC would improve the quality of life for many local residents who enjoy participating in the arts and cultural both as performers and as audience members. It would also serve to make Campbelltown a more desirable location for new residents by making the area more vibrant and provide opportunities for younger people to participate in the arts and activities for older residents. It would improve facilities available to local schools and help attract new residents who are sensitive to opportunities offered to families and children.

An actively programmed venue has the potential to be an agent for fostering greater social cohesion and effective social change.

A 380 seat PAC would balance the need for sufficient space to accommodate moderate to large events, but intimate enough to be used for smaller community events as well. A larger more aggressively programmed venue of 500 seats would also be a viable option but would require a larger annual operating subsidy. Consideration should also be given to incorporation of additional spaces, such as rehearsal room, dressing rooms, dance studios for hire and foyer gallery as well as outdoor space to maximise the variety of uses that the PAC could accommodate. This will help ensure that the PAC is well utilised and becomes a vibrant community asset.

While the capital investment and ongoing operating costs would need be determined by the development of concept plans and a comprehensive business case, a PAC would cost in the vicinity of \$22-30 million and would require an annual operating subsidy from council of at least \$200,000 to \$250,000 a year to successfully achieve the social and community benefits outlined in this report.

This Feasibility Study finds that it is worthwhile progressing the project and would recommend taking the next steps of developing concept plans for a number of different sites and engaging in a public consultation process.

APPENDIX 1 – Methodology and References

This study was based on desktop research and on a comprehensive consultation schedule.

Consultation		
Category	Organisation	Person
Amateur Theatre	Independent Theatre	Rob Crosser
Amateur Theatre	Adelaide Youth Theatre	Emma Riggs
Architect	Woods Bagot	Milos Milutinovic
Architect	ARM Architects	Ian McDougall, Peter Blacker
Professional Arts Organisation	Adelaide Festival Centre	Douglas Gautier
Children's Performing Arts Training/Classes	Adelaide Theatre Academy (Theatre Bugs)	Michael Eustice - Chair
Commercial Producer	GWB Studios Torben Brookman	Torben Brookman
Commercial Producer	QPAC Productions	John Glen
Department of Education	New School Director	Deb O'Reilly
Precedent Org	Marion Cultural Centre	Tyson Brown
Precedent Org	Golden Grove	Rick Gower
Precedent Org	Shedley Theatre	Andrew Russo
Precedent Org (school)	St Ignatius college	Alan Turnbull
Precedent Org	Hopgood Theatre	Sussan Baldwin
Precedent Org	Victor Harbor Council	Correspondence
Precedent Org	The Arthouse Wyong	Anne-Marie Smith
South Australian Government	Arts SA	Jennifer Layther - Director
Touring Association NFP)	SA Presenters Association	Susan Baldwin
Touring/National Association	PAC Australia	Katherine Connor ED

Community Consultation targeted at performers and potential hirers rather than community members or potential audience members. 33 people over two sessions.

Performing Arts Centre Community Workshop Wednesday 12 May 3pm		Performing Arts Centre Community Workshop Wednesday 12 May 3pm	
Name	Representing	Name	Representing
Emma Riggs	Adelaide Youth Theatre	Julee Coomber	Campbelltown Players
Madeline Melrose	Violinist/Teaching at Uni	Anita Becker	Marden Calisthenics
Marianne Riccio	Performer	Bernard Flynn	Student Performer
Lisa Innis	Innis Dance Studio	Kiera Flynn	Student Performer
Veronica Varga	Flamenco Dance Studio	Ben Todd	Maire Clark – President
Anna Harrison	Campbelltown Players	Rochelle Colon	Marie Clark – Vice President
Jacqui	Interested Parent (left early)	Merici Thompson	Marie Clark – Deputy Vice President
Leon Keegel	Campbelltown Players	Nina Brewer	East Adelaide Education Centre

Gerry Butler	Campbelltown Players	Nikki Ianunzio	Marden Calisthenics
Sue Forrest	Campbelltown Players	Chris Brockhouse	Campbelltown City Band
Sue Lloyd	Repair Café, Arts interest	Wayne Jackson	Campbelltown City Band
Rubin A	Performer/Director	Ann Whitby	ArtHouse
Carmel Visto33li	Met Musical Co & Dance School	Angela White	ArtHouse
Leonie Osborn	Met Musical Theatre Co		
Julie-Ann Bennett	LOVE Campbelltown		
Tracy Sargent	Musician/Band		
Helen Cooper	Simply Ballet		
Michael Cooper	Simply Ballet		
Brett Calver	Community Member		
Christina	Daughter		

Supporting data

Participation rates (Children 0-14) in South Australia 2020 ²⁷			
Activity	Total	Males	Females
			Estimate (000s)
Swimming	79.6	32.9	46.7
Dancing (recreational)	49.7	2.1	47.6
Gymnastics	41.3	9.1	32.2
Football/soccer	40.8	33.3	7.5
Netball	36.7	2.4	34.2
Australian football	31.3	26.2	5.0
Basketball	23.6	13.7	9.9
Athletics, track and field (includes jogging and running)	16.2	6.9	9.3
Cricket	12.8	12.1	0.8
Tennis	12.5	8.1	4.5
			Participation rate (%)
Swimming	25.5%	20.9%	30.1%
Dancing (recreational)	15.9%	1.3%	30.7%
Gymnastics	13.2%	5.8%	20.7%
Football/soccer	13.1%	21.2%	4.8%
Netball	11.7%	1.6%	22.0%
Australian football	10.0%	16.7%	3.2%
Basketball	7.6%	8.7%	6.4%
Athletics, track and field (includes jogging and running)	5.2%	4.4%	6.0%
Cricket	4.1%	7.7%	0.5%
Tennis	4.0%	5.1%	2.9%

²⁷ Ausplay SA data tables 2020 – April 30 2021

Full data from PAC Australia 2019 Economic Activity Report on financial overview for venues based on turnover size.

Financial Overview Annual Turnover \$0-\$1m 2019 (Sample size 13)		
INCOME	Average	Proportion of total
Box Office	\$86,769.77	16.20%
Ticketing Services	\$35,798.69	6.69%
Contract Performance Fees	\$286.69	0.05%
Venue Hire	\$69,263.31	12.93%
Recoverables	\$35,277.54	6.59%
Food & Beverage	\$19,198.85	3.59%
Merchandise	\$325.08	0.06%
Interest	\$98.92	0.02%
Other earned income	\$20,032.23	3.74%
Sub-total Earned income	\$267,051.08	49.87%
Federal Funding	\$0.00	0%
State/Territory Funding	\$54,692.31	10.21%
Local Govt Funding	\$201,273.38	37.59%
Sub-total Funding	\$255,965.69	47.80%
Philanthropic Trusts	\$0.00	0.00%
Sponsorship (monetary)	\$11,778.46	2.20%
Sponsorship (in-kind)	\$0.00	0.00%
Donations/Fundraising	\$11.08	0.00%
Non-government grants	\$692.31	0.13%
Sub-total Private Support	\$12,481.85	2.33%
TOTAL INCOME	\$535,498.62	100.00%
Expenditure		
Labour costs	\$234,488.08	44.69%
Marketing/Promotions	\$27,688.23	5.28%
Show Purchases	\$58,461.31	11.14%
Program expenses	\$16,913.31	3.22%
Food & Beverage costs	\$10,753.38	2.05%
Administration	\$66,657.62	12.70%
Repairs & Maintenance	\$23,391.92	4.46%
Other Expenses	\$86,342.08	16.46%
TOTAL EXPENDITURE	\$524,695.92	
NET RESULT	\$10,802.69	
Source: PAC Australia 2019 Economic Activity Report, p.23		

Financial Overview Annual Turnover \$1-\$2m 2018 (Sample size 8)

INCOME	Average	Proportion of total
Box Office	\$294,951.88	14.11%
Ticketing Services	\$100,156.88	4.79%
Contract Performance Fees	\$22,175.13	1.06%
Venue Hire	\$171,005.75	8.18%
Recoverables	\$140,519.00	6.72%
Food & Beverage	\$40,411.38	1.93%
Merchandise	\$1,460.13	0.07%
Interest	\$1,458.50	0.07%
Other earned income	\$73,451.13	3.51%
Sub-total Earned income	\$845,589.75	40.44%
Federal Funding	\$2,500.00	0.12%
State/Territory Funding	\$78,431.25	3.75%
Local Govt Funding	\$1,144,042.38	54.72%
Sub-total Funding	\$1,224,973.63	58.59%
Philanthropic Trusts	\$1,250.00	0.06%
Sponsorship (monetary)	\$12,797.25	0.61%
Sponsorship (in-kind)	\$0.00	0.00%
Donations/Fundraising	\$537.50	0.03%
Non-government grants	\$5,625.00	0.27%
Sub-total Private Support	\$20,209.75	0.97%
TOTAL INCOME	\$2,090,773.13	100.00%
Expenditure		
Labour costs	\$765,995.38	54.16%
Marketing/Promotions	\$65,230.88	4.61%
Show Purchases	\$104,774.25	7.41%
Program expenses	\$33,696.75	2.38%
Food & Beverage costs	\$63,229.38	4.47%
Administration	\$9,727.38	0.69%
Repairs & Maintenance	\$46,554.38	3.29%
Other Expenses	\$325,121.00	22.99%
TOTAL EXPENDITURE	\$1,414,329.38	
NET RESULT	\$676,443.75	
Source: PAC Australia 2019 Economic Activity Report, p.24		

Financial Overview Annual Turnover \$2-5m 2019 (Sample size 20)

INCOME	Average	Proportion of total
Box Office	\$425,748.40	14.22%
Ticketing Services	\$199,006.45	6.65%
Contract Performance Fees	\$59,480.25	1.99%
Venue Hire	\$474,535.65	15.85%
Recoverables	\$433,664.30	14.49%
Food & Beverage	\$228,629.70	7.64%
Merchandise	\$5,295.10	0.18%
Interest	\$4,818.75	0.16%
Other earned income	\$86,920.50	2.90%
Sub-total Earned income	\$1,918,099.10	64.07%
Federal Funding	\$1,543.85	0.05%
State/Territory Funding	\$67,676.40	2.26%
Local Govt Funding	\$972,047.50	32.47%
Sub-total Funding	\$1,041,267.75	34.78%
Philanthropic Trusts	\$0.00	0.00%
Sponsorship (monetary)	\$13,950.10	0.47%
Sponsorship (in-kind)	\$10,304.80	0.34%
Donations/Fundraising	\$5,010.35	0.17%
Non-government grants	\$4,977.20	0.17%
Sub-total Private Support	\$34,242.45	1.14%
TOTAL INCOME	\$2,993,609.30	
Expenditure	\$0.00	
Labour costs	\$1,382,946.65	47.41%
Marketing/Promotions	\$95,128.60	3.26%
Show Purchases	\$193,413.20	6.63%
Program expenses	\$174,802.30	5.99%
Food & Beverage costs	\$155,528.55	5.33%
Administration	\$418,115.35	14.33%
Repairs & Maintenance	\$104,156.95	3.57%
Other Expenses	\$393,048.30	13.47%
TOTAL EXPENDITURE	\$2,917,139.90	
NET RESULT	\$76,469.40	
Source: PAC Australia 2019 Economic Activity Report, p.25		

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APPENDIX 2 - A note on COVID

COVID 19 restrictions have had an enormous impact on the performing arts. Restrictions in place has limited performances. Restrictions on travel (both domestic and international) have profoundly impacted touring in 2020 and 2021. Ongoing international restrictions will continue to impact 2021 and most likely 2022.

However, in the longer term there is considerable optimism in the industry as was confirmed by the consultations as part of this project. Also, recent events, such as the 2021 Adelaide Fringe are cause for optimism. While ticket sales were down around 25%, the open-access festival featured more than 900 events over 31 days – including 85 in outdoor spaces – and attracted an estimated total attendance of 2.7 million. Despite border restrictions, restricted capacity and check-in requirements a total 632,667 tickets sold.²⁸

This report is premised on the performing arts industry eventually returning to something akin to pre-COVID. It should also be noted that smaller venues with a greater reliance on local performers will find it easier to continue functioning even if travel restrictions do persist.

²⁸ [It's a wrap: 2021 Fringe sells \\$16.4m worth of tickets \(indaily.com.au\)](https://www.indaily.com.au/it-s-a-wrap-2021-fringe-sells-16-4m-worth-of-tickets)

APPENDIX 3 – Example Programs

Marion Cultrul Centre Program May 28- July 03, 2021



Here Comes the Sun Beatles Tribute Show

Friday 28 May

WHEN: Friday 28 May

TIME: 7:00PM - 8:45PM

COST: Tickets - \$35
Concession - \$30

AUDIENCES: Resident, Senior, Adult

Rachael Leahcar pays tribute to The Beatles, performing songs from her album 'Here Comes The Sun' and many more, to celebrate more than 50 years of ...

[READ MORE ►](#)



Vertical Gardening

Saturday 29 May

WHEN: Saturday 29 May

TIME: 1:30PM - 3:30PM

COST: - 15.00

AUDIENCES:

Resident, Youth, Senior, Business, Visitor, Multicultural, Adult

From engineered walls to DIY projects, learn the pros & cons of vertical gardening including irrigation, potting mixes, plant selection, variety of ...

[READ MORE ►](#)



Centrestage presents An Evening of Original Music

Saturday 29 May

WHEN: Saturday 29 May

TIME: 8:00PM - 10:00PM

COST: Tickets - \$20

AUDIENCES:

Resident, Families, Youth, Senior, Adult

Join us for an evening of original music performed by the very best of South Australia's talent with Chris Finnen, Marty Summer, Ravie with Toni & ...

[READ MORE ►](#)



Blue The Film

Wednesday 09 June

WHEN: Wednesday 09 June

TIME: 7:00PM - 9:00PM

COST: \$5 -

AUDIENCES: Resident, Families, Adult

Blue The Film is a cinematic song for our oceans; beautiful intimate and grand. Blue is a provocative journey into the ocean realm, witnessing this ...

[READ MORE ►](#)



Becky and the Gents

Friday 11 June

WHEN: Friday 11 June

TIME: 7:00PM - 8:00PM

COST: Tickets - \$35
Concession - \$30

AUDIENCES: Resident, Adult

Join one of Adelaide's favourite female entertainers, Becky Blake, and her band of talented gents (Gary Isaacs, Enrico Morena and Ron Kosmider) for ...

[READ MORE ►](#)



The Indoor Jungle Information Session

Saturday 12 June

WHEN: Saturday 12 June

TIME: 2:00PM - 4:00PM

COST: All Tickets - \$5

AUDIENCES:

Resident, Youth, Senior, Adult

Come along to an information session with Haidi Sutherland from The Indoor Jungle. Haidi is a horticulturalist and indoor plant specialist. ...

[READ MORE ►](#)



Greg Hart in Concert

Tuesday 15 June

WHEN: Tuesday 15 June

TIME: 11:00AM - 12:15PM

COST: All tickets - \$20

AUDIENCES: Resident, Senior, Adult

Join Greg Hart as he sings songs from his many sell out tribute shows and his leading roles in musical theatre. All tickets \$20, transaction fee ...

[READ MORE ►](#)



Digital Tools for Disasters

Thursday 24 June

WHEN: Thursday 24 June

TIME: 10:00AM - 11:00AM

COST: FREE

AUDIENCES: Resident, Business, Visitor, Adult

Learn what apps and online tools you can use to increase your preparedness for a disaster or emergency.

[READ MORE ►](#)



Your Sensational Mix of Hits Show

Saturday 03 July

WHEN: Saturday 03 July

TIME: 8:00PM - 10:00PM

COST: Tickets - \$38
Concession - \$33

AUDIENCES: Resident, Senior, Adult

Presented by Allsorts of Entertainment. Join us as Tony and the Pulse Band dish up, a little bit of Country, hits from Dolly Parton, Kenny Rogers, ...

[READ MORE ►](#)

The Art House Wyong, Program May 30 – September 11, 2021



JB DANCE PRESENTS
JB DANCE MID YEAR SHOW: ELITE & SELECT
Showing at The Art House Theatre



PATRICK SMITH PRESENTS
ART EXHIBITION: PATRICK SMITH - AN ABSTRACT IMAGINATION
Showing at The Art House Foyer Exhibiti...



THE ART HOUSE PRESENTS
CREATIVE WORKSHOPS: SINGING
Showing at The Art House



FEEL PRESENTS PRESENTS
ED KUEPPER WITH JIM WHITE
Showing at The Art House Studio



CONCERTANTE ENSEMBLE PRESENTS
SUBLIME CLARINET - CONCERTANTE ENSEMBLE
Showing at Greenway Chapel



JB DANCE PRESENTS
JB DANCE MID YEAR SHOW: JELLY BEANS LAKE MUNMORAH & TERRIGAL
Showing at The Art House Theatre



JB DANCE PRESENTS
JB DANCE MID YEAR SHOW: LAKE MUNMORAH & KANWAL
Showing at The Art House Theatre



DOWNUNDER PROMOTIONS PRESENTS
TOM BURLINSON IN SWING THAT MUSIC
Showing at The Art House Theatre



JB DANCE PRESENTS
**JB DANCE MID YEAR
 SHOW: JELLY BEANS
 TOUKLEY & TUGGERAH**
 Showing at The Art House Theatre



JB DANCE PRESENTS
**JB DANCE MID YEAR
 SHOW: TERRIGAL &
 NIAGARA PARK**
 Showing at The Art House Theatre



JB DANCE PRESENTS
**JB DANCE MID YEAR
 SHOW: UMINA &
 TUGGERAH**
 Showing at The Art House Theatre



THE ART HOUSE PRESENTS
**HAMLET: PRINCE OF
 SKIDMARK**
 Showing at The Art House Theatre



THE ART HOUSE PRESENTS
**TOMMY LITTLE - I'LL SEE
 MYSELF OUT**
 Showing at The Art House Theatre



THE ART HOUSE PRESENTS
**CREATIVE WORKSHOPS:
 INTRODUCTION TO
 DIRECTING**
 Showing at The Art House



THE ART HOUSE PRESENTS
**CREATIVE WORKSHOPS:
 IN-DEPTH DIRECTING**
 Showing at The Art House



JB DANCE PRESENTS
**JB DANCE MID YEAR
 SHOW: JELLY BEANS
 LONG JETTY**
 Showing at The Art House Theatre



THE ART HOUSE PRESENTS
**CREATIVE WORKSHOPS:
 INTRODUCTION TO
 STAGE MANAGEMENT**
 Showing at The Art House



THE ART HOUSE PRESENTS
**CREATIVE WORKSHOPS:
 IN-DEPTH STAGE
 MANAGEMENT**
 Showing at The Art House



THE ART HOUSE PRESENTS
**THE OWL AND THE
 PUSSYCAT**
 Showing at The Art House Studio



THE ART HOUSE PRESENTS
**THE OWL AND THE
 PUSSYCAT MUSIC
 WORKSHOP AND
 PERFORMANCE**
 Showing at The Art House



THE ART HOUSE PRESENTS
**THE OWL AND THE
 PUSSYCAT FREE
 ORIGAMI ACTIVITY**
 Showing at The Art House



THE HARBOUR AGENCY PRESENTS
HUMAN NATURE
 Showing at The Art House Theatre



THE ART HOUSE PRESENTS
**OPERA AUSTRALIA -
 CARMEN**
 Showing at The Art House Theatre



ENTERTAINMENT CONSULTING PRESEN...
**MARINA PRIOR & DAVID
 HOBSON: THE 2 OF US**
 Showing at The Art House Theatre



DG GLOBAL PRESENTS
1927
Showing at The Art House Theatre



AUSTRALIAN GLOBAL ENTERTAINMEN...
**THE AUSTRALIAN
TENORS**
Showing at The Art House Theatre



THE ART HOUSE PRESENTS
HEART IS A WASTELAND
Showing at The Art House Theatre



THE HARBOUR AGENCY PRESENTS
**THE AUSTRALIAN BEE
GEES SHOW**
Showing at The Art House Theatre



A LIST ENTERTAINMENT PRESENTS
ARJ BARKER
Showing at The Art House Theatre



BEN MAIORANA ENTERTAINMENT PRE...
**MUSIC OF THE NIGHT:
AN INTERNATIONAL
TRIBUTE TO ANDREW
LLOYD WEBBER**
Showing at The Art House Theatre



A LIST ENTERTAINMENT PRESENTS
**ROSS NOBLE - 2021
COMEBACK SPECIAL**
Showing at The Art House Theatre



SYDNEY COMEDY FESTIVAL PRESENTS
**SYDNEY COMEDY
FESTIVAL SHOWCASE
2021**
Showing at The Art House Theatre



THE ART HOUSE PRESENTS
BEEP
Showing at The Art House Studio



THE ART HOUSE PRESENTS
**LIOR - BETWEEN YOU
AND ME**
Showing at The Art House Theatre



SEASOUND PUBLICITY / DEBLEA PRO...
**THE ROCK SHOW OZ
EDITION**
Showing at The Art House Theatre



THE HARBOUR AGENCY PRESENTS
**THE WHITLAMs -
GAFFAGE AND CLINK
2021**
Showing at The Art House Theatre



THE ART HOUSE PRESENTS
AMPHIBIAN
Showing at The Art House Studio



THE HARBOUR AGENCY PRESENTS
**REMEMBER THE DAYS OF
CAT STEVENS,
STARRING DARREN
COGGAN**
Showing at The Art House Theatre



THE ART HOUSE PRESENTS
**MAN WITH THE IRON
NECK**
Showing at The Art House Theatre



THE HARBOUR AGENCY PRESENTS
**TODD MCKENNEY SINGS
PETER ALLEN AND LOTS
MORE!**
Showing at The Art House Theatre

