

Professional Performing Arts Venue Study Needs Analysis



Prepared for Auckland Council

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CONSULTANTS TO THE HOTEL, TOURISM & LEISURE INDUSTRIES

A member of Crowe Horwath International

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GLOSSARY

Term / Abbreviation	Definition
APO	Auckland Philharmonia Orchestra
ATC	Auckland Theatre Company
CBD	Central Business District
Council	Auckland Council
Drama theatre	Traditional theatre, usually with proscenium arch and fixed end-stage theatre configuration
Flexiform theatre	A theatre that is effectively a “black box” which can be configured in multiple ways
Fly tower	Large structure above the stage with associated ropes, counterweights, and pulleys that enables a technical crew to quickly move set pieces, lights, and microphones on and off stage by ‘flying’ them in.
Lyric theatre	Traditional horse-shoe shaped theatre with balconies providing good acoustics and an intimate atmosphere
Maidment	Maidment Theatre, University of Auckland, Alfred Street
Mainstage	Mainstream product with a wide audience base
Mercury	Mercury Theatre, Mercury Lane, Newton, currently owned by Equippers Church
Proscenium arch	Arch at the front of a stage through which the audience views a performance
Studio	Small (<200 seats) black-box theatre space
TAPAC	The Auckland Performing Arts Centre, Western Springs

EXECUTIVE SUMMARY

Auckland Council (“Council”) engaged Horwath HTL Limited (“Horwath”) to undertake a study into the need and market demand for professional performing arts venues throughout the Auckland Council area over the next 15 years.

This report is partly based on our 2008 report of the same name undertaken for the Auckland City Council.

The consulting brief requires that this updated study should take into account / address the following factors:

- an updated assessment of the needs of existing performing arts groups and practitioners in the Auckland Council area
- all existing significant performing arts venues throughout the Auckland Council area, in addition to the central area
- an updated “gap analysis” in terms of identified needs which are not adequately met with existing available venues in the Auckland Council area
- an assessment of the relative need for additional centrally located venues (as opposed to non-CBD venues), with associated rationale
- an assessment of the need for and the role that venues in suburban locations in the Auckland Council area could fulfill, for example as part of a professional regional network and touring circuit
- a strategic assessment of the most appropriate locations for particular venue types in the Auckland Council area
- assess and compare the venue development options currently being planned or suggested (or any other new options identified through the research) to determine how well each option addresses the immediate and / or future identified needs and demands of the performing arts sector. Current venue options include:
 - a refurbished St James Theatre
 - a refurbished Mercury Theatre
 - Auckland Theatre Company’s proposal for a theatre at Wynyard Quarter.

Summary of key findings

1. A new 600 seat theatre in the central city / CBD is the highest and most urgent priority for the professional performing arts sector as a whole in order to:
 - address the venue gap between Q Theatre (maximum of 460 seats) and the ASB Auditorium (approximately 2,000 seats) which has been further exacerbated since our 2008 Study by the withdrawal of the 700 seat SKYCITY Theatre from the market for most professional performing arts product

- ensure Auckland Theatre Company (“ATC”), as Auckland’s leading theatre company, has secure access to an appropriate venue over the medium to long term
 - address ATC’s longstanding need for a venue of this size for at least some of its shows and to generate a substantial proportion of its annual box office revenue
 - ensure Auckland, supporting the aspiration of being a premiere world city, has an international standard drama theatre for the presentation of “Mainstage” product by local producers as well as domestic and international touring work
 - provide an additional new venue in central Auckland for professional dance, as well as a potential venue for the NZ Film Festival.
2. This 600 seat theatre needs to be in the central city / CBD rather than a suburban location because it needs to attract its audience from throughout the region.
 3. ATC’s Waterfront Theatre proposal has the potential to immediately address this priority venue need and address ATC’s longstanding need for a secure venue.
 4. The Mercury Theatre cannot meet the priority need identified for a 600 seat theatre for professional drama because of a number of physical constraints and challenges associated with the building including access and location. If the Mercury is not used principally by ATC, it would compete head on for hirers and audiences with the new Q Theatre, the Maidment Theatre, the Powerstation (for live music) and, less directly, with the Bruce Mason Centre and Genesis Energy Theatre.
 5. The Auckland Philharmonia Orchestra (“APO”) have identified the Mercury Theatre as a suitable venue to meet their rehearsal needs provided sufficient external funding support can be pledged to assist with upgrading the venue (including heritage and seismic upgrade costs) for these purposes.
 6. In the medium to longer term (6+ years), once the 600 seat venue need is addressed, the next venue gap in Auckland would be for a 1,400 – 1,500 seat venue.
 7. The St James Theatre does not address a current high priority need for a professional performing arts venue.
 8. In the medium to longer term a refurbished St James could meet the gap for a 1,400-1,500 seat venue, subject to further analysis on the potential impacts of this on the business of existing venues such as the ASB Auditorium, and pending the outcome of a decision on the location of the proposed national convention centre. In the short term, a refurbished St James Theatre would:
 - attract a considerable proportion of its utilisation from events currently staged at the ASB Auditorium and The Civic – most particularly, opera, ballet and commercial shows
 - attract additional “Mainstage” touring shows to Auckland which currently can’t find a suitable venue in Auckland (whether from elsewhere in New Zealand, or from Australia and elsewhere internationally)

9. There is no short or medium term need for any other new midscale venue (eg: 300 – 600 seats or more) for the professional performing arts elsewhere in the Auckland Council area.
10. There is a shortage of rehearsal and support services accommodation space for professional performing arts organisations, especially in central Auckland.

Summary of current situation

There are currently nine professional performing arts venues in central Auckland and six venues elsewhere in the Auckland Council area which are used by professional performing arts groups and by community groups.

In addition there are 17 small and medium sized community-focused venues located throughout Auckland, the larger of which are occasionally used by professional groups. These venues play an important role in providing supplementary venues to those located centrally, particularly to emerging professional groups.

SKYCITY have withdrawn their 700 seat theatre for professional performing arts use, except for some events during the annual Comedy Festival. However SKYCITY have reached agreement with the NZ Film Festival with regard to their continued use of the venue for two seasons in 2011. SKYCITY intend to promote Las Vegas-style light entertainment and sports shows, and the like, for which purpose their venue was originally designed.

The New Zealand Film Festival also uses The Civic for its most popular screenings. The future loss of the SKYCITY Theatre is a major threat to the NZ Film Festival as there is no alternative available venue in central Auckland with a similar seating capacity and the required projection facilities.

ATC is a heavy user of the Maidment Theatre which contributes to that venue's high utilisation. ATC has previously relied on using the SKYCITY Theatre for one or two popular shows each year which have generated 40 – 50% of ATC's box office revenue.

The Q Theatre, which will open in September 2011 with a maximum seating capacity of 460 seats, will fill venue gaps between the Herald Theatre (186 seats) and the Maidment Theatre (448 seats). The flexibility of this new venue will allow it to cater for a more diverse body of work than either the Herald or Maidment, thereby significantly contributing towards the diversity of professional performing arts in Auckland.

What the Q Theatre complex will not provide is:

- a replacement venue of the scale of the SKYCITY Theatre in the CBD / central area of Auckland – with the only venue alternatives of this scale being the Genesis Energy Theatre in Manukau and the 1,164 seat Bruce Mason Centre in Takapuna (which can operate in a 600 seat mode as well)
- a suitable venue for ATC's most popular shows, which require a seating capacity greater than 460 seats if they are to achieve or exceed the level of

box office revenue achieved in the past (at SKYCITY Theatre) without additional costs

- a suitable venue for NZ Film Festival screenings which are likely to be displaced from SKYCITY Theatre after 2011
- a satisfactory dance rehearsal venue.

Summary of proposed theatre developments

ATC Waterfront Theatre

ATC have developed plans for a purpose-built theatre centre at North Wharf in the Wynyard Quarter. The planned theatre centre (incorporating a 600 seat 'mainbill' drama theatre and a 200 seat flexiform theatre) is to be co-located with the new ASB Bank head office building to be owned by Kiwi Income Property Trust. The site is owned by Auckland Waterfront Development Agency Ltd (Waterfront Auckland) which strongly supports the proposal.

This would immediately address the need for a new 600 seat theatre which is the highest and most urgent priority for the sector as a whole in order to:

- ensure ATC, as Auckland's leading theatre company, has secure access to an appropriate venue over the medium to long term
- provide an additional new venue for professional dance in central Auckland
- ensure growing companies (eg: Silo Theatre) have access to appropriately sized venues for their "popular" works (either the ATC venue, or Maidment Theatre, assuming its increased future availability)
- ensure Auckland, supporting the aspiration of being a premiere world city, has an international standard drama theatre for the presentation of "Mainstage" product by local producers as well as domestic and international touring work
- provide a potential 600 seat venue for NZ Film Festival screenings.

Providing a recognised "home" for ATC, a suitable new centrally located venue for contemporary dance and a possible future venue for NZ Film Festival events will be a significant outcome. The provision of the venue will be important in ensuring ATC's business model is financially sustainable and allowing it to further its work at the development end of the spectrum (which will in turn feed work into existing and new studio and flexiform venues).

The ATC theatre development cost is approximately \$41 million, including approximately \$6 million value contributed by ASB Bank. ATC's funding model assumes \$10 million funding from Auckland Council, which we understand has been formally requested from Council.

Mercury Theatre

ATC have looked at whether the Mercury Theatre could fulfil their needs for a new venue. They have advised us that the Mercury is not suitable for their needs, based

on detailed investigations they have carried out, and that they have no interest in purchasing the building.

We believe the Mercury Theatre cannot meet the high need identified for a 600 seat theatre for professional drama because of a number of physical constraints and challenges associated with the building, including access and its location. If the Mercury is not used principally by ATC, it would compete head on for hirers and audiences with the new Q Theatre, the Maidment Theatre, the Powerstation (for live music) and, less directly, with the Bruce Mason Centre and Genesis Energy Theatre.

APO are currently undertaking a detailed due diligence on whether the Mercury could be a suitable orchestral rehearsal venue principally for themselves but also similar users. We are advised by APO that initial indications are favourable, and that the APO Board consider that it could be financially feasible to purchase the Mercury for this purpose, providing sufficient external funding support can be pledged to assist with the heritage and seismic upgrade costs associated with the venue.

The APO plan would result in a venue principally suited as a rehearsal space, with limited public seating (approximately 100 seats in the stalls, 200 seats in the balcony and the potential for additional seating on bleachers on the stage). APO's plan would enable the Mercury to be used for education, community outreach purposes and recordings, but could also allow some public music and dance performances (eg: full orchestra, choral, chamber orchestra, chamber music, contemporary music, dance, etc).

We understand that initial indications are that the total project cost would be approximately \$20 million and that APO intend to apply for funding support from Auckland Council in relation to seismic and heritage building refurbishment costs.

St James Theatre

The St James Theatre does not address a current high priority need for a professional performing arts venue. A refurbished St James could meet the future opportunity identified for a venue with a seating capacity in the range of 1,400 – 1,500 seats. However such a venue would:

- attract a considerable proportion of its utilisation from events already staged at the ASB Auditorium and The Civic – most particularly, opera, ballet and commercial shows
- attract additional “Mainstage” touring shows to Auckland which currently can't find a suitable venue in Auckland (whether from elsewhere in New Zealand, or from Australia and elsewhere internationally); however these additional “Mainstage” shows are likely to compete with existing Auckland-produced performing arts and entertainment product for “share of wallet” discretionary expenditure.

At this point in time, considerable uncertainty exists around government's intentions for selection of a preferred location for a proposed national convention centre, and its capacity to commit substantive funding for such a centre.

The future implications of the provision of a national convention centre (wherever it is located) will have a substantial impact on the business of THE EDGE, and on the ASB Auditorium in particular – and the impacts will be very different depending on whether the convention centre is located at THE EDGE or not.

The future business case and financial viability of the St James Theatre cannot be considered without also assessing the future business and financial viability of the ASB Auditorium and The Civic. This cannot be adequately addressed until there is some reasonable degree of certainty around the location and timing of the provision of the national convention centre.

We understand that Council estimates are that the capital cost of a full refurbishment of the St James Theatre to provide a venue of 1,400 – 1,500 seats would be in excess of \$65 million, excluding the price of securing ownership of the building.

Other venue needs – Rehearsal space

The APO, whose principal performance venue is the Great Hall of the Auckland Town Hall, has a need for improved rehearsal space, as their existing rehearsal space in Dominion Road is unsatisfactory in many respects. The acoustic and other physical space requirements of a large orchestra mean that a suitable rehearsal space is relatively specialised.

There is also an identified need for replacement and additional centrally located rehearsal space for dance companies (in addition to dance performance venues). There is a proposal for such facilities to be developed as Stage Two of The Auckland Performing Arts Centre (“TAPAC”) at Western Springs. The project has been presented to Auckland Council as a Partnership Project. Current estimates are that the project cost is a little over \$7 million.

Recommendations

We recommend that Auckland Council should:

- evaluate and consider supporting ATC’s current plans for a new Theatre Centre at North Wharf, Wynyard Point, as a matter of priority because it has the potential to immediately meet the highest priority identified venue need and address ATC’s long-term needs
- evaluate and consider supporting any proposal which comes from APO with regard to their potential purchase of the Mercury Theatre as a rehearsal venue because it addresses APO’s long-term need for an improved rehearsal venue and provides a sustainable future use for a heritage listed building which can be made fit for purpose
- evaluate and consider supporting the proposed expansion of the facilities at TAPAC in Western Springs because it would provide additional rehearsal space for professional dance companies which is identified as a need
- keep a watching brief in relation to ensuring the future of the St James Theatre is not threatened

- further research and evaluate future options for the St James once the future provision of, or planning for, a proposed national convention centre is clear, including where it is located and its impact on the ASB Auditorium in particular
- work with and assist the various venue managers of mainly Auckland Council owned community-based performing arts venues in relation to various proposals for minor capital works (mainly asset improvements / renewals), including clarifying their timing and priority, and how they support development of performing arts organisations throughout the community.

1. INTRODUCTION

1.1 BACKGROUND

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The consulting brief requires that this updated study should take into account / address the following factors:

- an updated assessment of the needs of existing performing arts groups and practitioners in the Auckland Council area
- an updated assessment that takes into account all existing significant performing arts venues throughout the Auckland Council area in addition to the central area
- an updated “gap analysis” in terms of identified needs which are not adequately met with existing available venues in the Auckland Council area
- an assessment of the relative need for additional centrally located venues (as opposed to non-CBD venues), with associated rationale
- an assessment of the need for and the role that venues in other locations in the Auckland Council area could fulfill, for example as part of a professional regional network and touring circuit
- a strategic assessment of the most appropriate locations for particular venue types in the Auckland Council area
- assess and compare the venue development options currently being planned or suggested (or any other new options identified through the research) to determine how well each option addresses the immediate and / or future identified needs and demands of the performing arts sector. Current venue options include:
 - a refurbished St James Theatre
 - a refurbished Mercury Theatre
 - ATC’s proposal for a theatre at Wynyard Quarter.

1.2 OUR APPROACH AND OUR SCOPE OF WORK

Our scope of work included:

- initial Council planning workshop, which involved:
 - reviewing and finalising the project methodology and timeframe based on input from Council
 - identifying key issues for further investigation
- wide industry consultation. A complete list of parties that we consulted with is included as Appendix A. Our consultation was undertaken with the purpose of identifying the status of existing venues, venue gaps based on existing user requirements, and emerging user requirements that could influence future venue requirements
- preparation of this report outlining our findings and recommendations.

1.3 EXCLUSIONS OF SCOPE

This study provides a high-level evaluation of potential venue solutions. It does not include the following:

- business plan creation / analysis
- projections of capital costs
- quantification of market demand
- a detailed review of or any commentary regarding the business case or feasibility study for the proposed ATC theatre development.

1.4 DISCLAIMERS

Our report is based on certain assumptions, estimates and other information developed from research, consultation with the professional performing arts sector and our knowledge of the industry. The sources of information and the bases of significant assumptions and estimates are stated in our report.

We are responsible to you, as our client, and not responsible to any other parties who may act or rely on our report.

2. BACKGROUND

Our 2008 study of the same name for Auckland City Council made the following key recommendations:

- Council should progress with Q Theatre to address the need for a flexiform venue as quickly as is possible.
- Council should immediately commence planning and development of a 500 – 600 seat drama theatre within the Aotea Precinct.
- Council should plan for a 100 – 200 seat studio theatre to be co-located with the drama theatre.
- There should be independent governance and management of some, or all, of the new venues in order to help stimulate diversity and creativity in the sector.
- The three venues should be clustered together and co-located with café / bars to maximise their overall effectiveness.
- Ideally, rehearsal and office space should be incorporated into the new drama theatre to improve the quality and range of rehearsal space available for dance and drama in the Auckland CBD.
- Council, together with relevant sector representatives, should negotiate with the University of Auckland and SKYCITY to secure greater certainty regarding the on-going availability of these venues until the high priority venues are developed.

Subsequently, the following has occurred:

- Q Theatre is under development in the Aotea Precinct and is planned to open in September 2011
- Council did not progress planning for a 500 – 600 seat drama theatre in the Aotea Precinct, but ATC has developed advanced plans for such a theatre at North Wharf, Wynyard Quarter, with strong support from Waterfront Auckland
- Q Theatre will have independent governance and management arrangements
- The Box café has recently opened in the newly refurbished front of the Aotea Centre overlooking a substantially improved Aotea Square
- ATC's rehearsal and support services accommodation needs have been addressed through the provision of a new venue in Dominion Road, Balmoral
- APO are well advanced with a due diligence process regarding a long-term solution for their rehearsal and support services accommodation needs at the Mercury Theatre in Newton
- a group of supporters interested in seeing the return of the Mercury Theatre as a commercial and community performing arts and music venue, the Mercury Rising Campaign, has been formed and is attempting to secure ownership of the venue
- SKYCITY have withdrawn their 700 seat theatre from the market for the professional performing arts except for some events during the annual

Comedy Festival, and will not accept such bookings; the venue is planned to be used in future for Las Vegas-style light entertainment and sports shows

- The University of Auckland has discontinued the plan it had in 2008 to turn the Maidment Arts Centre into a music venue for purely university use and has stated that it has no plans to withdraw the venue from being available to the performing arts community of Auckland
- the former Auckland City Council and THE EDGE developed plans for a proposed national convention centre to be developed at the Aotea Centre and submitted this plan to central government as part of a contestable site evaluation process, the results of which have yet to be announced; the plan also assumed Council securing ownership of the St James Theatre and restoring it as a professional performing arts venue, on the assumption that the ASB Auditorium would be increasingly dedicated to conferences
- a group of supporters, the St James' Saviours, has been formed to advocate for restoring the St James Theatre for such use.

3. CURRENT PROFESSIONAL PERFORMING ARTS VENUES

We have updated our assessment of the adequacy of Auckland's current professional performing arts venues both in the context of their individual capabilities as well as the overall mix of venues that are available. To assist in this analysis, we used again a framework from our 2008 analysis for considering the roles that different types of venues play in supporting different types of performing arts product.

Performing arts venues tend to specialise in hosting specific types of performance product within a particular genre, depending on their size (seating capacity), amenities, ambience, cost of hire, business model and operational ethos. We have categorised these different product-types as "Mainstage", "Off", and "Off-Off", derived from the concepts of "Broadway" product, "Off-Broadway" product and "Off-Off-Broadway" product.

An explanation about these categories of venue is attached in Appendix B. We have used these categories of venue in our subsequent analysis of existing Auckland venues.

3.1 CHANGES IN PROFESSIONAL PERFORMING ARTS VENUES IN AUCKLAND

It is interesting to note the development of new performing arts venues, and venue closures, in Auckland over the last 25 years. This assists in understanding the context of the current range of venues available in Auckland.

Table 3.1: Venue Developments and Closures in Auckland: 1985 - 2010

"New" venues		Venues closed or no longer available	
ASB Auditorium (1990)	2,256 seats	His Majesty's Theatre (1988) (est.)	1,100 seats
Hawkins Theatre (1990)	318 seats	Theatre Corporate (1991)	125 seats
Herald Theatre (1992)	184 seats	Mercury Theatre (1992)	635 seats
SKYCITY Theatre (1996)	700 seats	Mercury Gods (1992)	100 seats
Bruce Mason Centre (1996)	1,164 seats	Galaxy Theatre (1995)	300 seats
Basement Theatre (1998)	100 seats	Watershed Theatre (1996)	250 seats
Civic Theatre (2000)	2,378 seats	St James Theatre (2007)	1,910 seats
TAPAC (2003)	120 seats	SKYCITY Theatre (2010)	700 seats
Genesis Energy Theatre (2005)	700 seats		
Mangere Arts Centre (2010)	274 seats		
Q Theatre (under construction)	460 seats		
Total seats added	8,654 seats	Total seats lost	5,120 seats
Average seats per venue added	787 seats	Average seats per venue closed	640 seats

When Q Theatre opens in September 2011, Auckland will have gained over 3,500 theatre seats (net) over the period of 25 years. The highest capacity increases have occurred through the provision of two large-scale theatres – the ASB Auditorium at the Aotea Centre, and The Civic (formerly a picture theatre), both managed by THE EDGE (4,634 seats combined).

Over the same period, Auckland has lost several smaller theatre venues (eg: the Mercury and Watershed) as well as His Majesty's in 1988 and the larger St James Theatre in 2007.

SKYCITY have now withdrawn their 700 seat theatre for professional performing arts use, except for some events during the annual Comedy Festival. They intend to promote Las Vegas-style light entertainment and sports shows, for which purpose it was originally designed.

The Watershed was Auckland's only flexiform venue. The Q Theatre will provide a purpose-built flexiform venue seating up to 460 in its maximum seating configuration.

The remaining mid-size drama theatre in the Auckland CBD (prior to the opening of Q Theatre) is the University of Auckland's 448 seat Maidment Theatre which opened in 1976.

3.2 CURRENT PROFESSIONAL PERFORMING ARTS VENUES IN AUCKLAND

There are currently nine professional performing arts venues available in central Auckland and six regional venues.

The specifications and indicative utilisation rates of these venues are summarised in Tables 3.2 and 3.3. Table 3.2 lists those venues which have a predominantly drama and dance focus. Table 3.3 includes the other venues, most of which are multi-purpose venues.

Of the venues which specialise principally in drama and dance, two CBD venues (the larger Maidment and smaller Herald) both currently have high levels of utilisation, as does the TAPAC theatre at Western Springs, which also functions as a community venue.

The other five regional professional venues (those which do not have a permanently resident amateur dramatic theatre group) have available capacity.

Of the other professional performing arts venues (ie: those which do not specialise principally in drama and dance), the Classic and the Auckland Town Hall achieve high utilisation levels.

Table 3.2: Venues with Professional Drama / Dance Focus

Venue	Capacity	Theatre Type	Predominant Use	Indicative Utilisation ¹
Basement Theatre	100	St, RS	Small cast drama, comedy	Medium
Musgrove Studio (Maidment Arts Centre)	105	St, PS	Small cast drama, contemporary dance	Medium
TAPAC	120	St, RS	Small cast drama, contemporary dance	High
Herald Theatre	186	FS, PS	Small cast drama	High
The PumpHouse	192	FS, PS	Small cast drama	Medium
Mangere Arts Centre	274	St, RS	Community events, dance	High
Hawkins Theatre	318	PS, FS	Small cast drama, film	Low
Maidment Theatre	448	FS, PS	Drama, dance	High
Genesis Energy Theatre	700	FS, RS	Drama, orchestral music, dance, comedy	Medium
Bruce Mason Centre	1,164	FS, F, PS	Drama, musicals, dance, comedy	Medium
Total	3,607			

NOTE: St = Studio, RS = Removable seats, PS = Permanent seats, FS = Fixed stage, F = Fly tower

ATC is a heavy user of the Maidment Theatre which contributes to its high utilisation. ATC has previously relied on using the SKYCITY Theatre for one or two popular shows each year.

Silo Theatre Company is a heavy user of the Herald Theatre at the Aotea Centre, although this venue is limited in its flexibility and total capacity for larger shows.

Table 3.3: Other Professional Venues

Venue	Capacity	Theatre Type	Predominant Use	Indicative Utilisation
Classic Comedy Club	140	Cabaret	Comedy	High
Concert Chamber, Auckland Town Hall	497	FS, PS / RS	Chamber music, small scale drama, comedy	Medium
Great Hall, Auckland Town Hall	1,673	FS, PS / RS	Orchestral music, chamber music	High
ASB Auditorium	2,256	FS, F, PS	Short-season large scale productions including opera, ballet, drama, musicals	Medium
Civic Theatre	2,378	FS, F, PS	Longer season large scale musicals and drama, cinema	Medium
Total	6,944			

NOTE: RS = Removable seats, PS = Permanent seats, FS = Fixed stage, F = Fly tower

¹ There is no standard measure of utilisation amongst theatre venues. The indicative utilisation levels are our assessment based on discussions with venue operators. We anticipate that not all venue operators will agree with our assessments but they are intended to reflect the extent to which there is spare capacity for additional activity at times desirable to potential hirers.

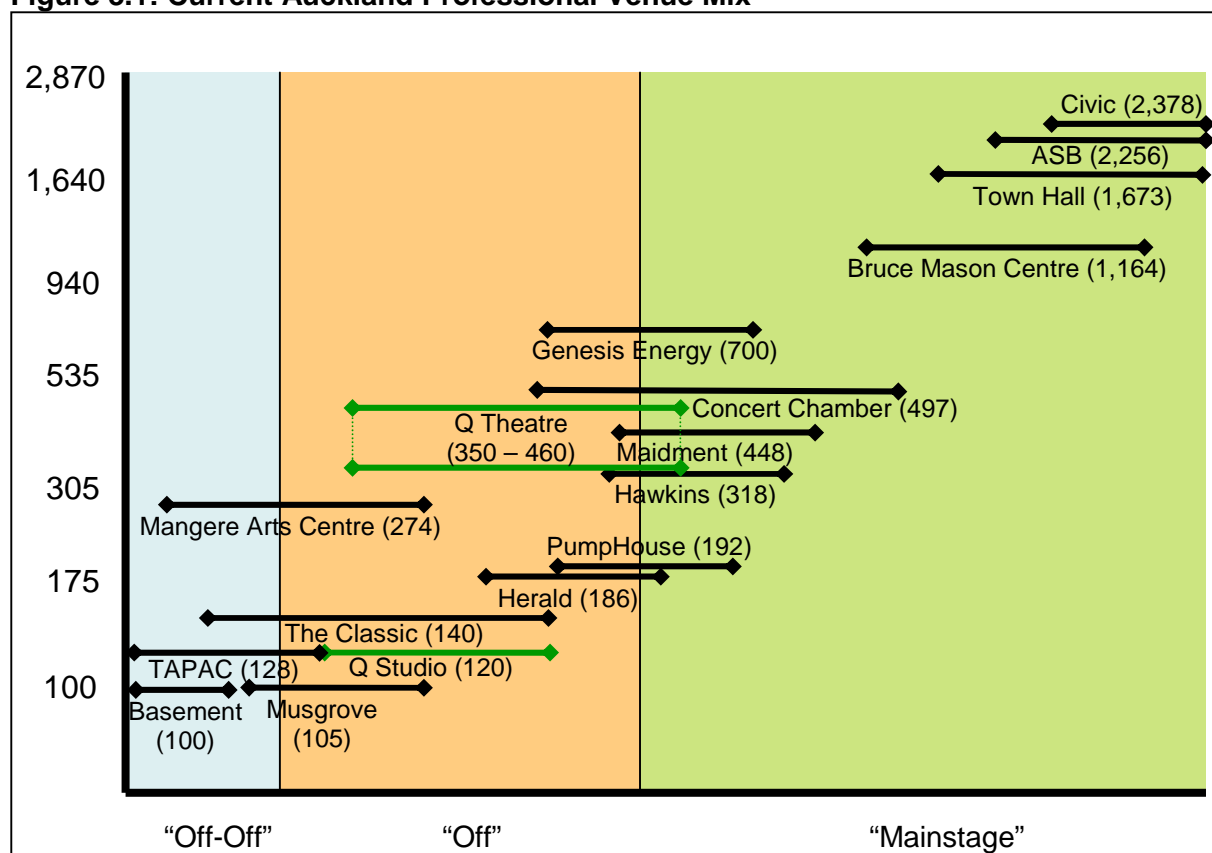
The New Zealand Film Festival uses The Civic for its popular screenings, and has used the SKYCITY Theatre for most of its screenings in the past. The loss of the SKYCITY Theatre is a major concern to the NZ Film Festival as there is no good alternative venue with projection facilities and similar total capacity.

The Concert Chamber of the Auckland Town Hall is impacted in terms of its availability for hire and utilisation because of noise transference which occurs between the Great Hall and Concert Chamber.

The “venue map” below shows the current professional performing arts venues in Auckland both in relation to their maximum capacity² as well as the different types of product they tend to support. The size of each segment is indicative of each segment’s likely audience base (eg: “Mainstage” product has the widest popular appeal and plays to larger audiences in larger venues).

Q Theatre is shown (in green) as two “current” venues (main flexiform venue, plus studio) given its imminent opening in September 2011. The Q Theatre studio will duplicate the theatre at TAPAC at Western Springs in terms of its size and functionality. However, in order to show both venues on the map we have shown Q studio as presenting principally “Off” product, and TAPAC presenting principally “Off-Off” product, as the venues will be different in terms of their “look and feel” as well as location.

Figure 3.1: Current Auckland Professional Venue Mix



(Source: Horwath HTL)

² The scale on the graph is logarithmic rather than linear.

Our comments about these specific venues follow, in venue size order, based on our consultation and visits to these venues.

3.3.1 THE BASEMENT (100 SEATS)

The Basement is an “Off-Off” theatre space owned by Auckland Council and located below (and leased to) the Classic Comedy Club. The venue is used for experimental / developmental theatre, generally produced by entry-level practitioners. The space has an 80 – 100 seat capacity. Its moveable seating rack provides some flexibility although this is hampered by the lack of size and height within the theatre space. The venue has only limited amenities / facilities for both practitioners and audience.

The advantages of the space are its affordability, “ambience” and CBD location. The small capacity of the theatre means it is not a viable venue for commercial shows. This does not impact on its ability to fulfil its role as an entry level venue, but does prevent it from having a role as an “Off” venue where commercial sustainability is required.

Our consultation has identified that the effectiveness of The Basement as an “Off-Off” venue could be improved:

- by excavating to increase the height of the venue
- through increased operational funding to improve the levels of support to venue hirers.

3.3.2 MUSGROVE STUDIO, MAIDMENT ARTS CENTRE, UNIVERSITY OF AUCKLAND (105 SEATS)

The Musgrove Studio (“Musgrove”) is a 105 seat theatre located in the Maidment Arts Centre at the University of Auckland. Although it was originally designed to be a flexiform venue, the seating has subsequently been fixed. As a purpose-built venue, the theatre is of a different style to the Basement and straddles both “Off-Off” and “Off” in terms of the type of product that is performed. The theatre is predominantly used for small-scale theatre and dance. Like the Maidment Theatre³, the long-term availability of the Musgrove to the general public is not guaranteed.

3.3.3 TAPAC, WESTERN SPRINGS (UP TO 128 SEATS)

TAPAC is a partnership between Western Springs College, the Performing Arts School of NZ and Auckland Council. TAPAC’s objective is to inclusively serve the needs and interests of diverse performing arts communities. It provides four dance and drama studios (including one which can be used for either an outdoor or indoor audience) and a flexible theatre of between 100 and 128 seats.

³ Refer to Section 3.3.9 re Maidment Theatre.

TAPAC is used for community performing arts education (being the home of the Performing Arts School of NZ), secondary school students and by professional performing arts and dance communities of Auckland.

The TAPAC studio venues achieve high utilisation during the day because of use by Western Springs College, and some professional groups find it difficult to secure rehearsal books for the duration they require.

The theatre is achieving high utilisation from professional performing arts groups (eg: Tempo Dance Festival, Auckland Fringe Festival, Original Scripts Youth Company, Rhythm Interactive, Co Theatre Physical, Touch Compass).

TAPAC is managed by two full time staff who operate in cramped facilities. A proposal has been developed to improve the performance capacity of the theatre and improve disabled access (\$200,000), and add new studios and service areas (\$6.9 million, allowing for some cost escalation over 2 – 3 years). The project could be staged over two or more years.

3.3.4 THE CLASSIC (140 SEATS)

The Classic is home to New Zealand's only fulltime professional comedy club. Located at 321 Queen Street in a building leased from Auckland Council, the venue accommodates up to 140 people in cabaret-style seating. The Classic is open six days a week and hosts approximately 450 live events annually, which include events other than stand-up comedy (eg: poetry nights). The venue also has two licensed bars, which allows for interaction between comedians and the audience after shows.

3.3.5 THE HERALD THEATRE, AOTEA CENTRE – THE EDGE (186 SEATS)

The Herald Theatre was originally designed as a storage facility and rehearsal space as part of the Aotea Centre. It was subsequently converted into a 186 seat theatre, and has an unusually steep rake to accommodate this number of seats. The venue has its own bar and foyer space, and is considered to be an intimate space. The venue is used by small independent theatre companies and is currently the main home of the Silo Theatre Company.

The Herald has been the only theatre⁴ that has catered predominantly for the "Off" segment of the performing arts spectrum. The venue has a number of limitations, which include:

- its relatively small size, which impacts on the financial viability of shows
- its fixed format which impacts on the diversity of work which can be presented in the venue
- the unusually steep seating rake, which results in unusual sight lines for the audience.

⁴ Prior to the opening of Q Theatre in September 2011.

3.3.6 THE PUMPHOUSE, TAKAPUNA (192 SEATS)

The PumpHouse is a well equipped 192 seat theatre venue owned by Auckland Council. There is a funding arrangement with the Trust / Incorporated Society which leases the building and manages and programmes the venue (approximately \$60,000 per annum). It does not have a resident amateur drama society, but the theatre is used by a combination of amateur and professional drama presenters (eg: Tim Bray Productions). Its location, overlooking Lake Pupuke, is attractive, but “off the beaten track”, and the venue struggles to achieve high visibility / awareness in the community. There is an adjacent small outdoor amphitheatre which does not enjoy high utilisation, partly because of its weather dependence.

The PumpHouse typically is well suited to new or emerging to semi-established professional groups who are not yet able to attract high audience numbers or who can't take the risk on a larger venue.

Concept plans have been developed for an atrium development creating a new foyer for the venue, and a canopy over the adjacent amphitheatre, at an estimated cost of \$2 million. Plans for the development were not approved by the former North Shore City Council and there is no active strategy to pursue the project.

3.3.7 MANGERE ARTS CENTRE (274 SEATS)

The Mangere Arts Centre opened in September 2010, is owned by Auckland Council and was funded largely by the former Manukau City Council. The Centre comprises an art gallery and flexiform studio theatre space with between 202 – 274 seats. It is intended principally for community rather than professional performing arts use, although a number of professional groups have used the venue (eg: Massive, Black Grace).

The venue is proving to be popular with local community dance groups. However its maximum seating capacity means it will be constrained for professional dance groups.

Current booking levels indicate that the venue will achieve relatively good utilisation levels especially from community groups.

3.3.8 HAWKINS THEATRE, PAPAURA (318 SEATS)

The Hawkins Theatre in Papakura, owned by Auckland Council, is a well equipped and comfortable 318 seat theatre with currently 3 full-time equivalent staff. It has a local population catchment of up to 100,000 people (including approximately 50,000 in Papakura itself). However, the theatre has not been particularly well promoted in the local community in the past, with a result of low overall utilisation (currently approximately 30% overall), a limited range of product offering and low overall community awareness.

A recent change in management has introduced new impetus to the venue, the introduction of film screenings to increase overall utilisation, increased interest in the

venue from professional performing arts groups (eg: Royal NZ Ballet, Operatunity, Queen City Big Band) and improved awareness in the community.

A major lighting upgrade is imminent (\$80,000) with a second stage planned (\$40,000).

3.3.9 MAIDMENT THEATRE, UNIVERSITY OF AUCKLAND (448 SEATS)

The Maidment Theatre (“Maidment”) is owned and operated by the University of Auckland and is located on campus with access from Alfred Street. The theatre has a seating capacity of 448 over two levels and includes a proscenium arch and fly rigging (but no fly tower). The front of house facilities include a small foyer with a beverage outlet, and a café space that is shared with the University. The Maidment opened in 1976 and was refurbished in 1997.

Usage of the Maidment is shared between professional performing arts groups, community groups and the University. Approximately 340 events – including theatre, dance and ceremonies – are hosted in the theatre annually. The Maidment is currently the primary venue for ATC and has therefore evolved into being primarily a “Mainstage” venue.

The Maidment is well suited for drama and dance, with good acoustics, good stage size, clear sightlines and a sense of intimacy. We are advised that the venue covers approximately 55 – 60% of its operating costs from hireage, with the balance of its costs being subsidised by the University.

From an audience perspective, the shortcomings of the venue are perceived to be the constrained legroom, cramped foyer and bar space, and the distance from the restaurants, bars and the general “buzz and activity” of the CBD. There are also some limitations in terms of disabled access.

From a practitioner’s perspective, the shortcomings of the venue include a shortage of storage space, aging technical equipment, relatively poor backstage facilities and the difficulty of accessing the venue for most hirers due to its currently high utilisation rates (with ATC as principal hirer).

The University of Auckland advises as follows:

- the University has been a long-term supporter of the performing arts in Auckland through its operation of the Maidment Theatre and in many other ways
- the Maidment is used for a diverse and large number of University and community performances every year
- whilst the University will always need to balance their desire to serve the community with their own core business needs, there are currently no plans to alter or discontinue the operation of the Maidment Theatre
- the University’s plans are reviewed every 1-2 years.

Hirers can currently book the theatre for up to two years in advance, except for a 6 week period from mid November each year. However, like the Musgrove Studio⁵, the long-term availability of the Maidment to the general public is not guaranteed.

3.3.10 CONCERT CHAMBER, AUCKLAND TOWN HALL – THE EDGE (497 SEATS)

The Concert Chamber seats up to 497 patrons on two levels in traditional concert seating format, and is acoustically and spatially designed for music performances. It has good acoustics for musical performance although there is inadequate noise separation from the Great Hall. The noise separation issues result in access to the Concert Chamber being restricted as management of THE EDGE give preference to larger commercial events in the Great Hall.

Due to the shortage of alternative venues, the Concert Chamber is also used for theatre, comedy and dance. However, the acoustics are regarded as being too “lively” to be ideal for the spoken word. These alternative uses also require the reconfiguration of the seating (which adds cost and reduces the maximum seating capacity to approximately 300), and not using the main stage, which is too high for general theatre use.

3.3.11 GENESIS ENERGY THEATRE, TELSTRACLEAR PACIFIC EVENTS CENTRE, MANUKAU (700 SEATS)

The Genesis Energy Theatre opened in 2005 as part of the TelstraClear Pacific Events Centre at Manukau, approximately 23 kms from central Auckland (22 minutes drive off-peak). The theatre is a multi-purpose venue that has a traditional end-stage configuration but has flexibility in its seating block with a maximum seating capacity of 700. It has good acoustics, clear sightlines and provides a good sense of intimacy.

The theatre is operated as a sub-regional facility focused on presenting product for residents and groupings in the Counties-Manukau area (eg: Samoan, Chinese). Professional performing arts organisations present product in the venue as part of reaching out to these communities (eg: NBR NZ Opera (Hansel and Gretel), Royal NZ Ballet (Tutus on Tour)). The Manukau Symphony Orchestra present approximately 6 – 8 concerts per year.

3.3.12 BRUCE MASON CENTRE, TAKAPUNA (1,164 SEATS)

The Bruce Mason Centre is located in Takapuna, approximately 10 kms from central Auckland (18 minute drive off-peak). It is the premier venue for the performing arts on the North Shore. The venue comprises a reconfigurable 1,164 seat auditorium with excellent acoustics and clear sightlines. The proscenium arch stage has a fly tower and sprung floor. Now 15 years old, it is in need of some refurbishment.

⁵ Refer to Section 3.3.2 re Musgrove Studio.

Although the venue is reasonably close to the Auckland CBD, and easily accessible via the motorway, there is a widespread perception among non-North Shore hirers and audiences that the venue is “too far away”. This impacts on its overall utilisation.

3.3.13 GREAT HALL, AUCKLAND TOWN HALL – THE EDGE (1,673 SEATS)

The Auckland Town Hall was opened in 1911 and refurbished in 1997. The Great Hall has a theatre-style capacity of 1,673 on three levels. The acoustics of the Great Hall are widely regarded as being world-class. It is the preferred venue of the APO and New Zealand Symphony Orchestra (“NZSO”) and is also regularly used for civic events (eg: graduation and citizenship ceremonies).

3.3.14 ASB AUDITORIUM, AOTEA CENTRE – THE EDGE (2,256 SEATS)

The ASB Auditorium is a 2,256 seat lyric theatre located in the Aotea Centre. It opened in 1990. Some design changes were made during construction which compromised the acoustics of the room for unamplified sound.

A two stage refurbishment is planned for the theatre in 2011 – 2013 which will involve acoustic improvements as a result of improved new surfaces and new seating (with a reduction in total seating capacity to approximately 2,000 seats). This will improve the overall performance and flexibility of the space.

The auditorium, especially after the refurbishment project, will be modern and comfortable, with good sightlines and good technical facilities. Some practitioners comment that the venue “feels more like a convention centre than a performing arts venue”. However the theatre hosts ballet, opera and international touring shows. Its large size makes it uneconomical for most local performing arts companies.

3.3.15 CIVIC THEATRE – THE EDGE (2,378 SEATS)

The Civic opened in 1929 as an “atmospheric” cinema theatre, and in 2000 underwent a \$42 million refurbishment and adaptive re-use project to convert it into a lyric theatre. The project included building a new fly tower and backstage area, improved function rooms and additional bar space. The theatre comprises 2,378 seats on two levels. It has an ornate interior décor which creates a “sense of occasion” that is congruent with the high-end performances that are hosted in the venue, including commercial musicals and international touring shows. The Civic is used as a large cinema venue during the Auckland Film Festival.

Due to its size and cost of hire, The Civic is largely uneconomical for most local performing arts companies.

3.4 COMMUNITY-FOCUSED VENUES IN AUCKLAND

In addition to these professional performing arts venues discussed in Section 3.3, which are the focus of this Study, there are 17 small and medium sized community-focused venues, the larger of which are occasionally used by professional groups

located throughout Auckland. These venues play an important role in providing supplementary suburban facilities, particularly for emerging professional groups. The main venues of this type are summarised in Table 3.4 below.

Table 3.4: Community-focused venues in Auckland

Venue	Location	Capacity	Theatre Type
Cellar Theatrette	Corban Estate Arts Centre Henderson	38	FS, PS
TheatreWorks	Birkenhead	70	RS
Titirangi Theatre	Lopdell House Titirangi	86	FS, PS
Stables Theatre	Main Highway, Ellerslie	100	FS, RS
Howick Little Theatre	Pakuranga	110	Flexiform
Dolphin Theatre	Onehunga	119	FS, PS
Artworks Community Theatre	Oneroa Waiheke Island	120	RS
Rose Theatre	Belmont	120	FS, PS
Westpoint Performing Arts Centre	Western Springs	120	FS, PS
Harlequin Musical Theatre	Howick	140	FS, PS
Malcolm Smith Theatre	Uxbridge, Howick's Creative Centre, Howick	160	RS
Victoria Picture Palace & Theatre	Devonport	180	PS, FS (3 Picture Theatres)
Centrestage Theatre	Orewa	218	PS, FS
Glen Eden Playhouse	Glen Eden	240	FS, PS
Raye Freedman Arts Centre	Epsom Girls Grammar Epsom	258	FS, PS
Centennial Theatre	Auckland Grammar Mt Eden	360	FS, PS
Dorothy Winstone Centre	Auckland Girls Grammar Ponsonby	790	FS, PS

NOTE: PS = Permanent seats, RS = Removable seats, FS = Fixed stage

The ability of these venues to fulfil a more significant role in supporting professional performing arts is constrained by:

- their primary purpose to meet school and other community needs (eg: incumbent amateur theatre groups) which limits access for rehearsals, flexibility around available dates, etc
- their non-CBD location and generally low public profile, which combine to make public access relatively limited in terms of total patron numbers
- their limited audience facilities (eg: onsite bar / café) which impact on the overall theatre experience.

3.5 REHEARSAL AND SUPPORT SERVICES ACCOMMODATION

There is a shortage of rehearsal and support services accommodation space for professional performing arts organisations, especially in central Auckland. Those theatre, dance and other professional performing arts organisations that draw performers and players from throughout the greater Auckland region prefer rehearsal space (if not also support services accommodation) either in the CBD or inner Auckland suburbs.

ATC have recently moved to a new rehearsal and support services 'homebase' in Dominion Road, Balmoral, and APO have a rehearsal venue and support services spread over three buildings nearby. NBR New Zealand Opera have administration offices in the CBD and a rehearsal, props and costumes store in Onehunga.

Other performing arts organisations (eg: Silo Theatre, Auckland Arts Festival, Black Grace) have entered into short-term leases on spaces in centrally located buildings that are planned for demolition or refurbishment / conversion (eg: in the Britomart precinct). While these spaces are relatively low cost, because of the current limited range of alternative uses, they are significantly compromised administration and rehearsal spaces in terms of size, configuration, fit-out, acoustic properties, etc.

The APO, whose principal performance venue is the Great Hall of the Auckland Town Hall, has a well recognised need for improved rehearsal space, as their existing rehearsal space in Dominion Road is unsatisfactory in many respects. The acoustic and other physical space requirements of a large orchestra mean that a suitable rehearsal space is relatively specialised.

4. VENUE NEEDS ANALYSIS

In assessing what needs there are for additional professional performing arts venues in Auckland we have briefly reviewed the provision of venues in comparative locations (Wellington, Brisbane and Adelaide). Our summary analysis is contained in Appendix C. Key findings are that:

- Wellington has a similar number of venues to Auckland despite its much smaller population, including two flexible venues and four venues in the range of 200 – 360 seats; this provides more support for small practitioners to emerge from the development end of the sector to the mid-career
- Brisbane has only a few extra venues than Auckland, but eight of them are in the range of 200 – 615 seats, providing a much more diverse mix of venues overall; when the Q Theatre opens Auckland will have two such venues in the central area, plus two suburban venues
- Adelaide has a smaller number of venues in total than Auckland but a better spread in terms of mix of venue sizes in the central city; a key comparison is the Dunstan Playhouse (615 seats) which sits between the 350 seat Space Theatre (flexiform) and 1,009 seat Her Majesty's Theatre.

We have also considered a statement of vision for the professional performing arts industry in Auckland which emerged from our consultation in 2008. The vision stated that:

“the sector will have a strong and vibrant interface with its audiences, embracing diversity and responding flexibly to emerging trends, so as to ensure its relevance, quality and sustainable development.”

Further comments about the components of this vision are contained in Appendix D. The key conclusion is the desirability of having a diversity of available venues from the perspective of both practitioners and audiences. This will assist in achieving improved financial sustainability of the sector (through better matching of venue costs and audience sizes) and providing a diverse range of product to the market (leading to further development of diverse and growing audiences).

In this section we:

- identify the industry's venue needs in the context of the current situation (prior to the opening of the Q Theatre)
- assess the impact of Q Theatre on meeting these needs
- identify the remaining needs (on a prioritised basis) for additional professional performing arts venues.

4.1 CURRENT SITUATION

Our industry consultation in 2008 and 2011 has identified that the current venue situation (prior to the opening of Q Theatre in September 2011) results in a number

of sub-optimal outcomes for professional theatre and dance practitioners and companies:

- some Auckland-based producers have been undertaking work in Wellington (and, in some case, overseas) but the work has not been produced in Auckland due to the lack of availability of suitable venues
- Creative New Zealand has been declining funding applications for Auckland producers due to the lack of suitable venues for the proposed work
- New Zealand-based touring work has not been coming to Auckland because of the lack of a suitable 300 – 400 seat venue
- ATC's need for a permanent venue has been accentuated principally because of the loss of the SKYCITY Theatre as a venue for their popular shows which have generated between 40 – 50% of ATC's annual box office revenue in the past
- the loss of the SKYCITY Theatre will have a detrimental impact on ATC's annual revenue generation potential and (consequently) its potential funding from Creative New Zealand and the Auckland Regional Amenities Funding Board
- the sustainability of ATC's commercial business model is therefore threatened, based on its current level of external funding support
- there is still some uncertainty around the medium to long-term availability of the Maidment Theatre, although the University of Auckland has no plans to find an alternative use for the venue
- there has been continuing difficulty for emerging and mid-career practitioners in establishing a strong profile in the Auckland market because of the lack of a suitably sized venue in the central area to economically support regular seasons of their work
- there is some reliance on suburban community-focused venues, particularly in the dance sector, because of the current lack of a suitably sized venue with an appropriate dance floor in the CBD; this has resulted in significant difficulty in creating strong audience awareness of this product (attributable to the low profile of community venues) and competing for space with community-based amateur theatre groups, etc
- reliance on adapting purpose-built spaces (eg: Auckland Town Hall's Concert Chamber) to undertake various activities (eg: theatre, dance, comedy) for which the spaces were never intended, thereby compromising the quality of work produced (eg: the acoustics of the Concert Chamber are too lively for the spoken word)
- dance and theatre companies struggling to optimise their profile and identity without a recognised "home", which contrasts with comedy that has The Classic and classical music that has the Great Hall of the Auckland Town Hall.

The opening of the Q Theatre complex in September 2011 will have the following impacts on the current situation:

- provide two new centrally-located performance venues, ideally designed to meet the needs of theatre and dance practitioners and their audiences
- partially replace the SKYCITY Theatre capacity, but with a venue that is more suited for both practitioners and audiences, and with a performing arts venue rather than gaming venue “ambience”
- provide an alternative CBD located 120 seat theatre venue to the TAPAC Theatre (Western Springs)
- provide an alternative CBD located (up to) 460 seat modern and flexible purpose-built venue to the 448 seat Maidment Theatre – and therefore greater availability to the wider industry of a venue of this scale for desirable / preferred performance dates / seasons
- provide better opportunities to match practitioners’ venue needs⁶, in terms of size, flexibility and availability, which should allow more optimal commercial outcomes, growing commercial sustainability, and growing overall industry capability, ie: better growth pathways
- additional venues for events during the Auckland Arts Festival and other such festivals and events
- provide limited additional rehearsal space in the CBD for theatre (although not well suited to the needs of dance).

The Q Theatre will fill the gap between the Herald Theatre and Maidment Theatre. The flexibility of the venue will allow it to cater for a more diverse body of work than either the Herald or Maidment, thereby significantly contributing towards the diversity of professional performing arts in Auckland.

The Q Theatre studio should assist in helping to provide improved identities for some of the independent theatre and dance companies in Auckland. The flexibility of the space will also enable it to better accommodate emerging art forms and the convergence of art forms. The new studio will provide a flexible space of a size between the existing Musgrove and Herald Theatres thereby expanding the variety of venues at the development / experimental end of the spectrum.

The venue will be different in style to the Basement and offer a more refined (eg: in terms of patron comfort levels, ambience, etc) and higher quality space for performance (eg: better back-stage facilities, improved technical capabilities, improved flexibility, etc).

With these qualities and higher capacity, the space will provide practitioners with another transitional venue capable of staging both “Off-Off” and “Off” productions.

The new studio could play an important role in the further development of the sector, similar to BATS in Wellington which is widely considered to be key to the health of Wellington’s theatre sector and has provided a seeding ground nationally for emergent practitioners. The similar space in Auckland will assist with the development of practitioners emerging from Auckland’s theatre training institutions.

⁶ Both theatre and dance practitioners / companies.

The new studio will assist in ensuring Auckland has a range of available venues suitable for a broad variety of work, especially if the Musgrove ceases to be available in the future. The studio space will be suitable for a range of festival uses including the Auckland Arts Festival, Comedy Festival, Tempo Festival of Dance, etc.

What the Q Theatre complex will not provide is:

- a replacement venue of the scale of the SKYCITY Theatre (700 seats) in the CBD / central area of Auckland – with the only venue alternatives of this scale being the Genesis Energy Theatre in Manukau and the 1,164 seat Bruce Mason Centre in Takapuna (which can operate in a 600 seat mode as well)
- a replacement CBD venue for SKYCITY for ATC's most popular shows (which require a seating capacity above 460 seats if they are to achieve a similar level of box office revenue in the future without additional costs from what has been achieved in the past)
- a satisfactory dance rehearsal venue.

4.2 PROFESSIONAL PERFORMING ARTS VENUE NEED PRIORITIES

High priority need (1 – 5 years)

The highest priority need for additional professional performing arts venues throughout Auckland is for a 600 seat theatre⁷ for drama, dance and film to be located in the central / CBD area. The venue needs to be located in the CBD rather than a suburban location because it needs to attract its audience from throughout the region.

This is the highest priority need because:

- there will be no centrally located venue between the 460 seat Q Theatre and the ASB Auditorium (approximately 2,000 seats after refurbishment) leaving an obvious gap
- the 700 seat SKYCITY Theatre which has been available until recently has now been withdrawn from the market for the performance of professional performing arts (except for the likes of some comedy shows)
- ATC, as Auckland's leading dramatic performing arts theatre company has a long-standing need for a venue of this size for at least some of its shows, and to generate a substantial proportion of its annual box office revenue.

Past experience of both venue managers and major hirers is that performances in the available venues that are not centrally located are not successful in attracting audiences from throughout the Auckland Council area, and this leads to sub-optimal financial outcomes for hirers (and, to some extent, the venues).

⁷ Our 2008 Study for Auckland City Council recommended a 500 – 600 seat theatre as a high priority; however, given the maximum seating configuration of Q Theatre at 460 seats, our view is now that a new drama theatre should be at the high end of the range.

Performances in these suburban venues do, however, attract audiences from their local sub-regional communities, and are therefore useful venues for performing arts companies to reach out to new / additional audiences.

The provision of Auckland's main professional performing arts venues in the central city / CBD area (if not concentrated in the Aotea precinct alone), as opposed to dispersal throughout the wider region, is desirable in order to:

- assist in creating a strong identity for the theatre and dance sectors
- create a sense of vitality and energy in central Auckland for audiences and visitors
- encourage creative synergies between performing arts organisations
- provide opportunities for operational and financial efficiencies in terms of management, operations and programming of venues where desirable
- assist accessibility for the widest range of audiences.

However there is a valuable role for professional performing arts venues elsewhere in the region. The advantages for having such venues located other than in the CBD are as follows:

- opportunity for professional regional touring product (eg: drama, dance, music, opera, ballet) to be presented in midscale venues – reaching out to sub-regional audiences who may not be attracted or accustomed to visiting CBD venues, or who find CBD locations inconvenient
- education programmes for schools related to the above genres
- venues for product which targets specific regional population sub-groupings (eg: specific ethnic groups, age demographics, etc).

Lower priority needs (6+ years)

Once the need for a 600 seat theatre venue is addressed in Auckland, the next venue gap in Auckland and therefore the next priority would be for a venue of a size between the new 600 seat venue and the refurbished ASB Auditorium at approximately 2,000 seats and The Civic at 2,378 seats.

A midway point between these existing and high priority venues is approximately 1,400 seats. Because of the size of such a venue it would also need to be located in the central area.

Such a venue would provide an alternative and more optimal sized venue than the ASB Auditorium and Civic Theatre) for the following uses:

- opera (target 1,500 seat capacity)
- ballet (target capacity similar to opera)
- contemporary music concerts which cannot sell over 2,000 seats
- film festival screenings

- Auckland Arts Festival events
- visiting shows and entertainment events which require a short to medium term run (eg: 3 shows – 20 shows) but which cannot sell sufficient tickets to fill either the ASB Auditorium or The Civic, and which are not suited to a shorter run.

In our consultation we did not identify a high or medium priority need for any other new midscale venue (eg: 300 – 600 seats or more) for the professional performing arts elsewhere in the Auckland Council area.

4.3 OTHER VENUE NEEDS – REHEARSAL SPACE

The APO have been seeking a replacement for their existing rehearsal space for several years. We identified this need in our 2008 study. APO's preferred solution is discussed in Section 4.4.2 below.

There is also an identified need for additional centrally located rehearsal space for dance companies. We identified this need in our 2008 study.

4.4 SPECIFIC VENUE PROPOSALS

In accordance with our brief, we have assessed three specific proposals against the priority needs of the professional performing arts industry.

4.4.1 ATC THEATRE CENTRE AT NORTH WHARF

ATC have developed plans for a purpose-built new theatre centre at North Wharf in the Wynyard Quarter. The theatre centre (incorporating a 600 seat 'mainbill' drama theatre and 200 seat flexiform theatre) is planned to be co-located with the new ASB Bank head office building to be owned by Kiwi Income Property Trust. The site is owned by Auckland Waterfront Development Agency Ltd (Waterfront Auckland) which strongly supports the proposal.

The ATC plan is consistent with:

- our highest priority venue need identified in Section 4.2 above
- with the high priority need identified in our 2008 study for Auckland City Council for a 500 – 600 seat drama theatre and the lower priority need for a new 100 – 200 seat studio theatre.

Waterfront Auckland and ASB Bank support the ATC theatre complex proposal because:

- it acts as a significant attracter of visitors to the new North Wharf area, especially in the evenings (120,000 – 150,000 people per annum)

- these visitors enliven the area and supports associated and nearby cafes, bars and restaurants – and enhancing their financial sustainability and potential to pay ground lease rentals
- it draws people to the new ASB head office building which reinforces the ASB Bank brand and its association and connection with the people of Auckland
- it adds to the vibrancy of the overall precinct as a desirable place to work, live and invest.

The theatre complex is also planned to include a fully equipped stage for open-air performances, bars, café and restaurants.

The 600 seat drama theatre is a high priority in addition to the new Q Theatre planned to open in September 2011, as identified in our 2008 report. The new Q Theatre has not been designed to meet the desire of ATC for a drama theatre on a permanent basis, and in particular does not provide the larger seat capacity to effectively replace the SKYCITY Theatre.

The 200 seat flexiform theatre provides substantial additional flexibility to ATC and allows it to further develop its emerging talent programme which assists to grow capacity and capability in the Auckland theatre industry.

As Auckland's leading theatre company, ATC's continued financially sustainable operation is important to the performing arts in Auckland:

- to ensure regular "Mainstage" product is available to the Auckland market⁸
- to maintain its important school's work via its Education Unit
- to maintain its development of new theatre works via its Literary Unit
- as ATC is a significant employer of practitioners
- given its "flagship" status in the sector in Auckland and New Zealand.

ATC has an important role in maintaining the theatre sector's profile and providing income to practitioners, as well as helping to develop audience and new works for the benefit of the wider professional performing arts sector.

A new 600 seat drama theatre is the highest and most urgent priority for the sector as a whole in order to:

- ensure ATC, as Auckland's leading theatre company, has secure access to an appropriate venue over the medium to long term
- ensure growing companies (eg: Silo Theatre) have access to appropriately sized venues for their "popular" works (either the ATC venue, or Maidment Theatre, assuming its increased future availability)

⁸ Between 2003 and 2006 ATC attracted an annual audience base ranging between 61,000 – 69,000 people.

- ensure Auckland has an international standard drama theatre for the presentation of “Mainstage” product by local producers as well as domestic and international touring work.

The ATC theatre development cost is approximately \$41 million, including approximately \$6 million value contributed by ASB Bank⁹. ATC’s funding model assumes \$10 million funding from Auckland Council, which we understand has been formally requested from Council. The balance of the funding required is planned to be raised from a naming rights sponsor (or sponsors), central government sources, charitable and philanthropic trusts and foundations, corporate donors and private donors. ATC state that they have strong supporters some of whom would support this project financially rather than a project in a Council owned or managed facility.

We are advised by ATC and ASB Bank that the timeframe for ATC securing the necessary funding commitments is tight if slippage on the building project and consequent increased capital costs¹⁰ are to be avoided.

While the Maidment Theatre is currently the primary venue for ATC it cannot meet all of ATC’s needs because:

- it has a number of shortcomings including relatively poor front of house facilities, a shortage of back of house storage, limited wing space, difficult loading bay access, and no fly tower
- it is not owned by an entity which is guaranteed to have a long term focus on or fundamental commitment to the performing arts
- the University of Auckland is unable to guarantee continued access to the theatre for third parties in the long term and this introduces significant uncertainty in any long-term planning by professional performing arts companies
- the Maidment is not close to restaurants and bars, and, being located on the University campus, is difficult to develop into the focus of any future cluster development.

Q Theatre could meet some of ATC’s needs, but it does not provide a replacement venue with a seating capacity similar to the SKYCITY Theatre.

The proposed new ATC drama theatre would be a high profile and purpose-built quality venue located in the emerging new North Wharf waterfront precinct. It will provide a purpose-built venue to showcase “Mainstage” product that provides a sense of “identity” or “home” for Auckland’s leading professional performing arts companies.

Providing a recognised “home” for ATC and a suitable new centrally located venue for contemporary dance will be a significant outcome. The provision of this venue will be important in ensuring ATC’s business model is sustainable and allows it to

⁹ The equivalent cost of space provided to ATC as part of the new ASB Bank head office development.

¹⁰ Through not being able to maximise planned cost savings by building the head office building and adjacent theatre at the same time according to the optimised building schedule.

further its work at the development end of the spectrum (which will in turn feed work into the existing and new studio and flexiform venues).

4.4.2 MERCURY THEATRE

The former 635 seat Mercury Theatre is located on Mercury Lane, off Karangahape Road, in Newton. From 1968 to 1991 it was the premises of the Mercury Theatre Company. The building is currently owned by the Equippers Church who have outgrown the venue. It has been offered for sale by the church since 2009.

The Mercury was designed by the architect Edward Bartley and built in the English Baroque style. It was initially known as the Kings Theatre and opened in 1910, making it the oldest surviving theatre in Auckland. In 1926, on being converted into a cinema, an entrance from Karangahape Road was built. This former entrance way has now been converted into a cafe and displays memorabilia of the Mercury.

The building has a Historic Places Trust Register Category II classification and an Auckland Council Category A listing (including the interior), which means that substantial or total demolition is a prohibited activity.

Potential future use: professional performing arts performance venue

ATC have looked at whether the Mercury could fulfil their needs for a new venue. They have advised us that the Mercury is not suitable for their needs, based on detailed investigations they have carried out on the building, and have no interest in purchasing the building.

Although the seating capacity of the Mercury Theatre is in the range we have identified is the highest priority for a new performing arts venue in Auckland, we accept the reasons ATC have given as to why the venue does not meet their requirements:

- stage too small
- wing space too small
- backstage too small
- poor access and load-in for props
- potential noise transference from nearby nightclubs in the evening
- general ambience and patron safety concerns in evening in nearby streets, including in relation to safe carparking in nearby streets and carpark building
- overall patron experience of a “Mainstage” venue in this location being inconsistent with building a premiere brand for ATC including assisting position Auckland as a premier world city
- risk of ATC losing audience numbers because of patrons not wanting to go to performances there based on their perceptions of the overall quality of the experience
- risk of ATC donors not being prepared to financially support a building upgrade project of this type to achieve sub-optimal outcomes in this location

- relatively high cost of building works required to achieve sub-optimal outcomes from an ATC perspective.

We therefore believe the Mercury cannot meet the high need identified in Section 4.2 for a 600 seat theatre for professional drama and dance.

The proponents of the Mercury Rising Campaign acknowledge that the theatre would not be suited as a permanent home for ATC, and that it is not ideal as a drama theatre as its only or primary use.

The Campaign proponents favour the Mercury being used for a diverse range of commercial and community uses. We agree that the Mercury could be suitable for some or many of the range of uses which have been indicated by the campaign proponents. We also believe that the wider range of audiences and uses would reduce the impact of some of the above negative factors identified by ATC.

However, if the venue is not used principally by ATC, it would compete head on for hirers and audiences with the new Q Theatre and the Maidment Theatre and, less directly, with the Bruce Mason Centre and Genesis Energy Theatre.

The Mercury Rising Campaign have not developed a business case which demonstrates how the venue would operate (eg: projected mix of uses / hirers, utilisation levels, commercial vs community hire rates). Such a business case would assist in identifying what proportion of the business would represent additional / new / incremental professional and / or community events (as opposed to events redistributed from other venues) and what the ongoing net operating costs of the venue would be, including ongoing building maintenance costs.

A key concern if the Mercury was to be secured as a multi-purpose performing arts venue relates to the total cost of the project. There is some uncertainty about:

- the extent of capital cost involved in upgrading the building structure to current earthquake code (except that the cost is relatively high, which may be influencing why the asking price for the venue appears to be relatively low)
- how the fly tower and backstage facilities could be made in some way fit for such a variety of purposes, and at what cost
- the timeframe over which such costs would need to be incurred
- who would fund, own and operate the building.

The campaign promoters currently have no legal structure or entity, and there is no funding plan other than seeking expressions of support from the general public and Auckland Council.

Potential future use: professional performing arts rehearsal / support services venue

APO are currently undertaking a detailed due diligence on whether the Mercury Theatre could be a suitable orchestral rehearsal venue principally for themselves but also similar users.

APO's current rehearsal venue in Dominion Road no longer meets their needs and they have been planning for an alternative venue for some time. Our 2008 report recommended that Council¹¹ should liaise further with APO regarding its rehearsal requirements including the potential for upgrading of its existing rehearsal venue in Mt Eden.

We are advised by APO that initial indications are favourable, and that the APO Board consider that it could be financially feasible to purchase the Mercury for this purpose, providing sufficient external funding support can be pledged to assist with the heritage and seismic upgrade costs associated with the venue.

The APO plan would result in a structure principally suited as a rehearsal space, with a reasonable amount of public seating (approximately 100 seats in the stalls, 200 seats in the balcony, and additional seating on bleachers at the rear of the stage). APO's plan would enable the venue to be used for education and community outreach purposes (for which its central location would be well suited), recording purposes, and public music and dance performances (eg: full orchestra, choral, chamber orchestra, chamber music, contemporary music, dance, etc).

The required modifications to the building could be designed and built in a way which could be reversed if necessary, returning the venue to a more flexible theatre venue in future years.

We are advised by APO that the Mercury Theatre is a more satisfactory long term solution than an upgrade of their current venue which would not provide the necessary acoustic uplift. The acoustic volume of Philharmonia Hall is approximately 2,500m³ whereas the Mercury would give approximately 3,800m³ which is more than a 50% uplift. The APO are currently required to muffle the brass section during rehearsals and increasingly seek out the Town Hall for rehearsals which has a volume of 16,000m³, at considerable additional cost.

We understand that initial indications are that the total project cost would be approximately \$20 million and that APO intend to apply for funding support from Auckland Council, in relation to seismic and heritage building refurbishment costs, and other support partners.

4.4.3 ST JAMES THEATRE

The St James is a proscenium arch theatre that was built in 1928 as a replacement for Fullers' Opera House. It was originally designed for travelling vaudeville shows¹² but was soon modified with the addition of cinema projection facilities. The theatre has hosted live performances and film ever since, until it closed in 2007 for fire safety reasons.

¹¹ The Auckland City Council.

¹² A form of variety entertainment comprising a series of separate, unrelated acts, including comedy, music, dance and short movies.

The building's design is a fusion of traditional theatre and American picture house design, with an ornate Spanish colonial-style interior décor that includes many rare / unique elements. In 1957, it was the first public space in New Zealand to be fully supplied with air conditioning. The theatre currently has a seating capacity of 1,910 over three levels, and has good acoustics and a good sense of intimacy. Access to the venue is from Queen Street and Lorne Street.

St James Theatre, along with much of the Queen Street block between the old ASB Tower and Rutland Street, is currently owned by the Norfolk Trustee Company, a private property development company. The developer has plans to demolish all the buildings on this site with the exception of the St James Theatre, and construct a multi-storey apartment complex with new retail shops and car parking.

The St James Theatre has a Historic Places Trust Register Category I classification (ie: higher than the Mercury Theatre) and an Auckland Council Category A listing, which also includes the interior.

In its current configuration as a 1,910 seat lyric theatre, the St James does not address a current high priority need for a professional performing arts venue. A refurbished St James could meet the future venue need identified in Section 4.2 for a venue with a seating capacity in the range of 1,400 – 1,500 seats¹³. We are advised that the St James seating capacity would be unlikely to exceed 1,500 seats once health and safety and patron comfort¹⁴ requirements are met.

The St James would provide an additional “Mainstage” venue between a new drama theatre (600 seats) and the refurbished ASB Auditorium (approximately 2,000 seats) and Civic (2,378 seats). Such a venue could have the potential to fulfil a wide range of roles including:

- providing NBR New Zealand Opera and the Royal New Zealand Ballet with the option of a more intimate venue than the ASB Auditorium for most if not all performances (ie: a high component of product displaced from ASB Auditorium)
- hosting medium scale international touring shows (eg: musicals and other similar entertainment shows which cannot fill The Civic or ASB Auditorium on a short season) and larger domestic touring work (eg: musicals, drama, dance which again cannot afford or sell sufficient seats in The Civic or ASB Auditorium)
- providing an intimate venue for contemporary music shows which cannot fill The Civic or ASB Auditorium or the Vector Arena
- possibly having the flexibility to operate as a 500 – 600 seat drama theatre (if some or all Dress or Upper Circle seats are excluded); however we are advised that the volume of such a theatre space (in terms of overall size) would not be well suited acoustically to projecting the spoken word.

¹³ A lower number of seats would not provide a feasible venue for NBR New Zealand Opera and, to a lesser extent, the Royal New Zealand Ballet.

¹⁴ Total seating capacity depends on the average width of seat, between 50 – 55 cm, which impacts on overall patron comfort levels.

However a refurbished St James Theatre would:

- attract a considerable proportion of its utilisation from events already staged at the ASB Auditorium and The Civic – most particularly, opera, ballet and commercial shows
- attract additional “Mainstage” touring shows to Auckland which currently can’t find a suitable venue in Auckland (whether from elsewhere in New Zealand, or from Australia and elsewhere internationally)

The additional “Mainstage” shows are likely to compete with existing Auckland-based and produced for “share of wallet” discretionary expenditure¹⁵.

Key steps that need to be taken to realise the potential of St James include:

- undertaking a business case analysis to:
 - identify the development costs associated with various development schemes that would meet a range of different user requirements
 - confirm the optimal feasible seating capacity of the venue
 - identify the space requirements of different development schemes
 - identify high-level utilisation levels, including product that is displaced from existing venues, and product that is new to Auckland
 - project operating revenues and operating costs associated with different development schemes
 - identify the likely impact on the utilisation levels, operating revenues and operating costs of the ASB Auditorium and The Civic
 - develop a cost-benefit assessment that confirms the optimal development scheme
 - identify the critical success factors that need to be achieved in order to accommodate the optimal range of users
- significant refurbishment and upgrade to meet modern building standards and the requirements of key users, as guided by the business case analysis.

At this point in time, considerable uncertainty exists around government’s intentions for selection of a preferred location for a national convention centre, and its capacity to commit substantive funding for such a centre.

The future implications of the provision of a national convention centre (whether at the Aotea Centre or not) will have a substantial impact on the business of THE EDGE, and on the ASB Auditorium in particular – and the impacts will be very different depending on whether the convention centre will be at THE EDGE or not.

¹⁵ Because “Mainstage” events by their nature involve much larger volumes of seats to be sold in the Auckland market (or by attracting visitors to Auckland from out of town). It is not clear how much capacity there is for substantial growth in “Mainstage” box office revenue growth in Auckland in the short to medium term.

The future business case and financial viability of the St James Theatre cannot be considered without also assessing the future business and financial viability of the ASB Auditorium and The Civic. This cannot be adequately addressed until there is some reasonable degree of certainty around the location and timing of the provision of a national convention centre.

4.4.4 OTHER REGIONAL PROFESSIONAL PERFORMING ARTS VENUE PROJECTS

In undertaking our consultation throughout the region we became aware of a few other proposed professional performing arts projects in relation to Auckland Council owned venues. These are listed below in Figure 4.1. This list excludes projects in relation to principally community-focussed venues which are not the focus of this Study.

Figure 4.1: Other Auckland professional performing arts venue projects

Venue	Project description
Corban Estate Arts Centre, Henderson	potential refurbishment of warehouses as rehearsal and performance venues, especially for dance
PumpHouse, Takapuna	proposed new foyer area and canopy over outdoor amphitheatre

(Source: Horwath HTL)

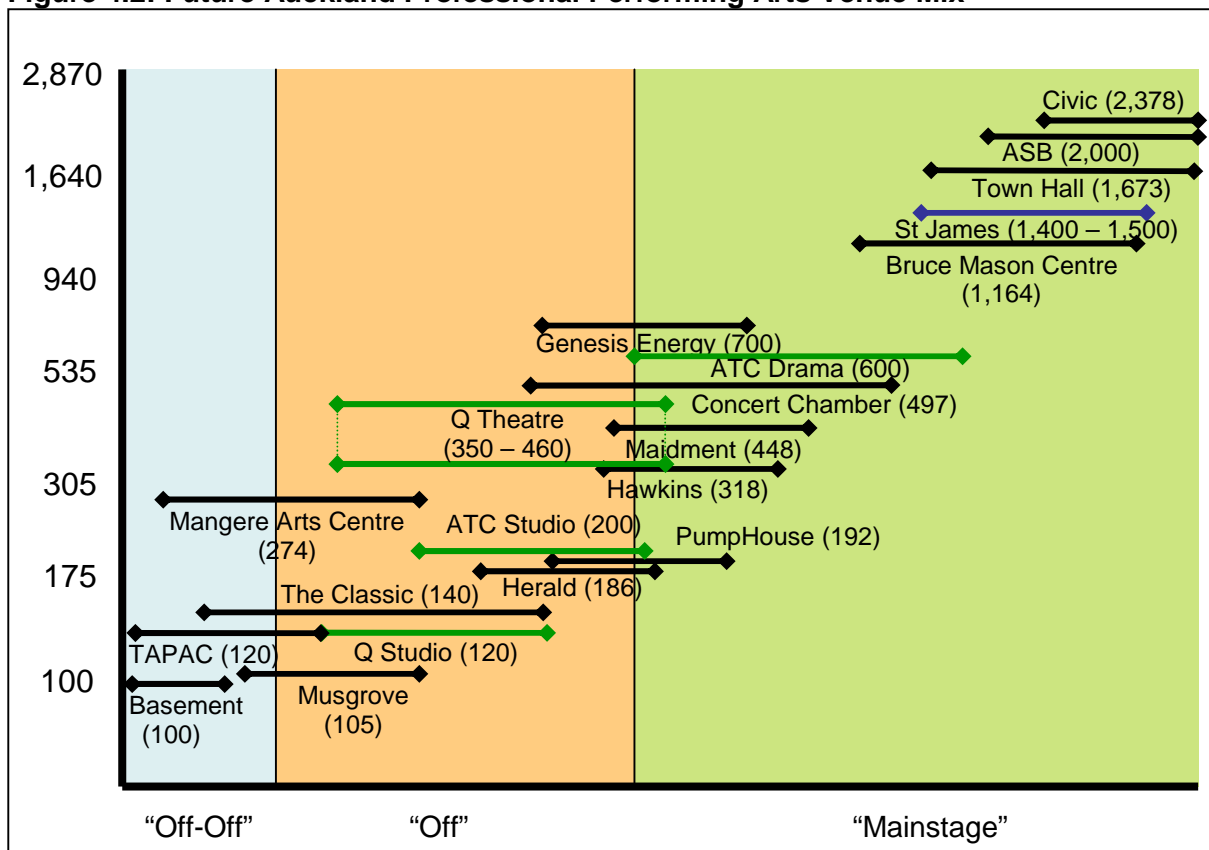
We have not identified these projects as being of high priority in the short to medium term, although they are opportunities to improve the functionality and utilisation of existing Council owned professional performing arts venues. As such they should be evaluated and considered as potential projects for future Council support in the context of other Council owned community-focussed venues.

4.5 FUTURE VENUE MAP

The future “map” of venues in Auckland, if the ATC Theatre Complex is developed and the St James Theatre is refurbished and reopened, would be as depicted in Figure 4.2 below.

The new venues would fill the existing identified gaps in the range and size of venues available in Auckland (and particularly in the central area, where venues attract audiences from throughout the whole Auckland Council area) and therefore assist in improving the diversity and sustainability of the professional performing arts sector in Auckland generally.

Figure 4.2: Future Auckland Professional Performing Arts Venue Mix



(Source: Horwath HTL)

APPENDIX A: CONSULTATION LIST

During the course of our research and analysis we consulted with the following people. In most cases the consultation involved direct meetings, either personally or in a small group situation. Telephone interviews were conducted for those people outside Auckland and a small number of people provided input by way of e-mails.

Organisation	Representative	Position
ASB Bank Ltd	Derek Shortt	GM ASB Property
ASB Community Trust	Jennifer Gill	Chief Executive
Auckland Arts Festival	David Inns	Chief Executive
Auckland Arts Festival	David Malacari	Festival Director
Auckland Chamber Orchestra	Peter Scholes	Musical Director
Auckland Council - Heritage	George Farrant	Principal Heritage Advisor
Auckland Council - Arts & Culture	Gail Richards	Manager, Arts, Culture & Events
Auckland Council - Property / Heritage / Strategy	Various	Various
Auckland Philharmonia Orchestra	Barbara Glaser	Chief Executive
Auckland Philharmonia Orchestra	Rosanne Meo	Chair
Auckland TEED Ltd	Linden Tierney	Sector Specialist Creative Industries
Auckland Theatre Company	Lester McGrath	General Manager
Auckland Theatre Company	Kit Toogood	Chairman
Auckland Waterfront Development Agency Ltd	John Dalzell	Chief Executive
Auckland Waterfront Development Agency Ltd	Aimee Comer	Project Manager
Black Grace	Neil Ieremia	Director
Bruce Mason Centre, Takapuna	Andrew Scott	Chief Executive
Corban Estate Arts Centre, Henderson	Martin Sutcliffe	Director
Creative New Zealand	Stephen Wainwright	Chief Executive
Dance Aotearoa NZ (DANZ)	Susan Jordan	Regional Manager
Equippers Church	Stuart Shutt	Elder
Glen Eden Playhouse (Waitakere Playhouse Theatre Trust)	Sheryl Watson	Theatre Manager
Hawkins Theatre, Papakura	Peter Hunt	Acting Theatre Manager
Jamacs Corporation Ltd	Peter McArthur	Director
Maidment Theatre, University of Auckland	Paul Minifie	Theatre Manager
Mangere Arts Centre	Naomi Singer	Manager
Mercury Rising Campaign	Richard Howard	Campaign Co-leader
Mercury Rising Campaign	Graeme Bennett	Campaign Co-leader
Ministry of Culture and Heritage	Kerry Harvey	Policy Manager
Ministry of Economic Development	Roger Wigglesworth	Director
NBR NZ Opera	Aidan Lang	General Director
NBR NZ Opera	Donald Trott	Director
NZ International Comedy Festival (NZ Comedy Trust)	Kylie Aitchison	Managing Director
NZ International Film Festival (NZ Film Festival Trust)	Sharon Byrne	General Manager
NZ International Film Festival (NZ Film Festival Trust)	Bill Gosden	Festival Director
Q Theatre	Susanne Ritzenhoff	General Manager
Regional Facilities Auckland Ltd	Dame Jenny Gibbs	Deputy Chair
Regional Facilities Auckland Ltd	Geoff Williams	Chief Operating Officer
Regional Facilities Auckland Ltd	Peter Stubbs	Board Member
Royal NZ Ballet	Amanda Skoog	General Manager
Silo Theatre	Shane Boshier	Director
SKYCITY Auckland	Simon Jamieson	General Manager NZ Facilities Development
St James Saviours Group	Bob Kerridge	Campaign Leader
TAPAC, Western Springs	Margaret-Mary Hollins	Manager
TelstraClear Pacific Events Centre, Manukau	Richard Jeffery	Chief Executive
THE EDGE	Robbie Macrae	General Manager
The PumpHouse, Takapuna	David Martin	Business Manager
Titirangi Theatre Inc, Lopdell House	Duncan Milne	President
University of Auckland	Marin Matulovic	Director of Finance
Victoria Picture Palace and Theatre, Devonport	Margot McCrae	Co-Chair

APPENDIX B: RELATIONSHIP BETWEEN THEATRE & DANCE VENUES AND PRODUCT-TYPE

Performing arts venues tend to specialise in hosting specific types of performance product within a particular genre, depending on their size (seating capacity), amenities, ambience, cost of hireage, business model and operational ethos. We have categorised these different product-types as “Mainstage”, “Off”, and “Off-Off”, derived from the concepts of “Broadway” product, “Off-Broadway” product and “Off-Off-Broadway” product.

“OFF-OFF” THEATRE

“Off-Off” theatre product is considered to have begun in 1958 as “a complete rejection of commercial theatre”¹⁶, and was initially hosted in coffeehouses in New York where actors and playwrights staged plays without any prior screening.

“Off-Off” product tends to be unsubsidised, experimental, cross-genre theatre involving a lot of unpaid effort by emerging artists and caters to a young / fringe audience – often mainly the friends and family of the artists. Ticket prices are rarely over \$20.

“Off-Off” venues tend to be small “found”¹⁷, “rough and ready” spaces with a youth-oriented, fringe culture. The spaces themselves generally have minimal amenities from both a practitioner and an audience perspective, but they are “made to work” by virtue of the experimental, “can-do” ethos intrinsic to these spaces. These spaces are hired out for a fixed fee or take a share of box office earnings, and often offer some form of support to resident practitioners. “Off-Off” venues provide a much needed point of entry for artists starting their careers to test new skills and ideas, and to be seen by those who might fund or support their work.

“OFF” THEATRE

“Off” theatre product is usually staged by artist groups aiming to combine cutting edge theatrical exploration with quality production values / standards and established practitioners.

Venues hosting “Off” product tend to operate with a strong developmental ethos, and often showcase the best of independent practitioners. They may be curated by an artistic director / programmer / artistic producer or host a resident company with additional co-productions supplementing the programme.

Practitioners providing “Off” theatre product tend to be mid-career, and tend to treat their host “Off” venue as a “professional home”, rather than a “social home” as in “Off-Off” venues. “Off” venues, particularly if they have a good bar and rehearsal

¹⁶ Robert Viagas, *The Backstage Guide to Broadway*, 2004

¹⁷ Converted spaces, rather than purpose-built venues

rooms, often act as a place of exchange / challenge / growth, and in this sense they are the “artistic hub” of the sector.

Audiences attracted to this product tend to be more risk averse than “Off-Off” audiences, and have a higher expectation of production values / standards. Ticket prices tend to be between \$30 and \$50 (although they can occasionally be dearer).

The “Off-Off” and “Off” segments are important in ensuring diversity in the performing arts and in providing practitioners and audiences with a variety of alternative access points to the performing arts.

“MAINSTAGE” THEATRE

“Mainstage” theatre product is usually represented by large-scale market-driven shows with high production standards, broad audience appeal and relatively high ticket prices (\$50 to \$100+). Audience expectations of production values / standards are high. For the majority of people, “Mainstage” product will be their only regular experience of the performing arts.

Mainstage venues generally have a large seat capacity. (Eg: a typical “Broadway” theatre in New York or “West End” theatre in London would have 500 seats or more). These venues and the shows they host play a crucial role in keeping the performing arts relevant for the general public, and help build trust in the genre.

APPENDIX C: VENUE PROVISION COMPARISONS

To help inform our analysis, we considered venue provision in three cities (Wellington, Brisbane and Adelaide) that are generally acknowledged as having vibrant and diverse performing art sectors.

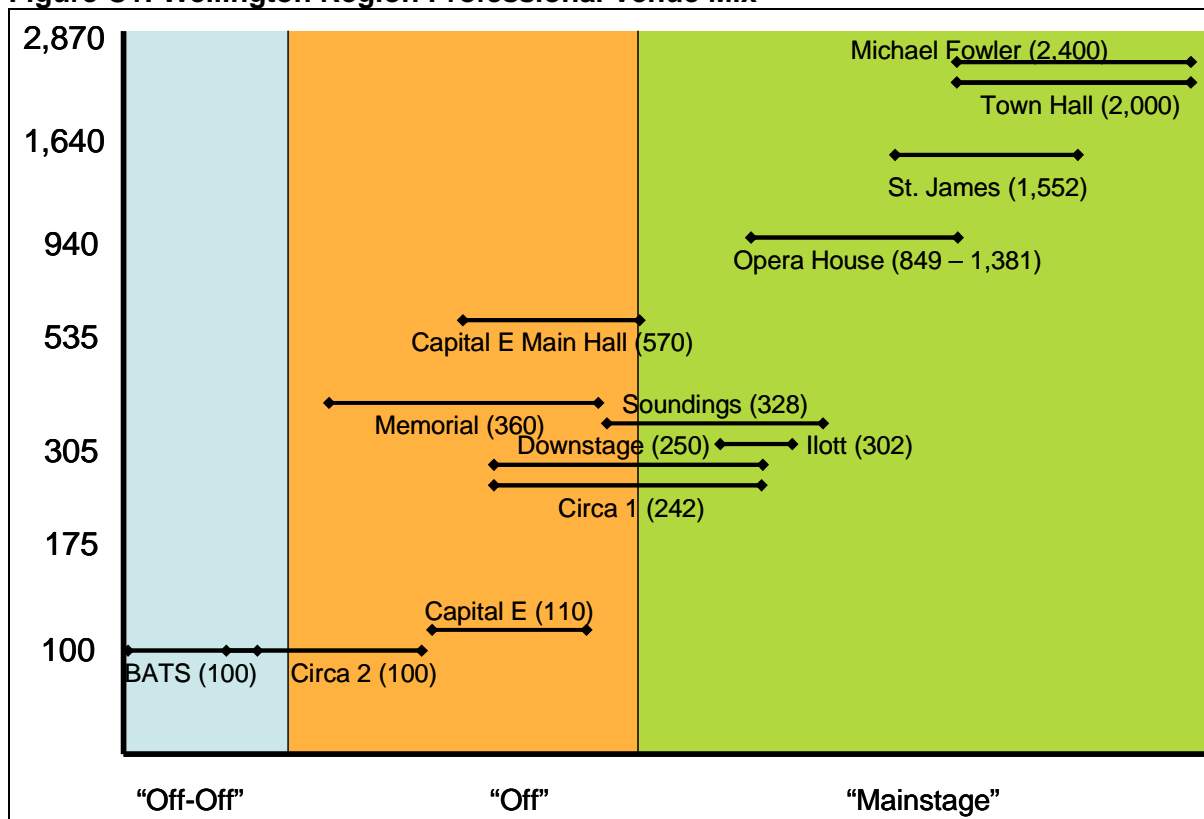
It should be noted that no one centre is necessarily an example of “best practice” and each city is acknowledged to have its own venue issues.

Furthermore, to some extent, the range and size of venues in any city will reflect the local population base and differences in population do need to be considered when making comparisons between cities.

WELLINGTON

The Wellington region has 13 professional venues, compared to 12 in the Auckland region. A key difference between Auckland and Wellington is that Wellington has four venues in the 200 – 360 seat range, including two (Downstage and Circa) that are flexible venues, which help to support local practitioners emerging from the developmental end of the sector into their mid-career.

Figure C1: Wellington Region Professional Venue Mix



(Source: Horwath HTL)

In Wellington, BATS and Circa 2 fulfil the same roles as the Basement and Musgrove, respectively, in Auckland. However, BATS is widely acknowledged as fulfilling its role as an “Off-Off” venue better than the Basement because:

- its theatre space is better and enables a more diverse range of presentation of work without compromise
- its audience and hirer amenities are generally of a higher standard
- it operates as a curated space
- there is more structured support offered to practitioners
- BATS is a better funded and resourced theatre.

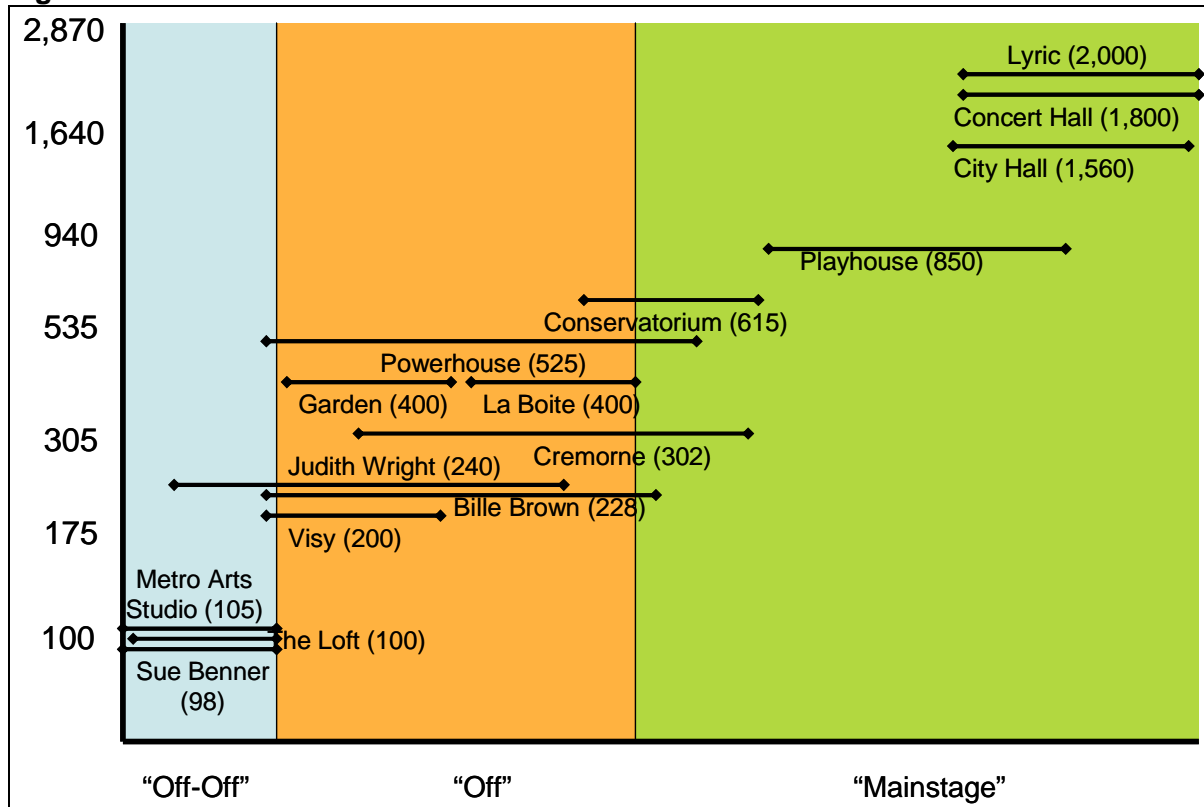
Local Wellington theatre practitioners predominantly use the smaller venues, while NZSO uses the Michael Fowler Centre, the Royal New Zealand Ballet (“RNZB”) and the NBR New Zealand Opera use the St James, and New Zealand touring productions tend to use the Opera House (often using only the stalls with an 850 capacity).

There are eight different entities operating Wellington’s 13 venues.

BRISBANE

Brisbane has a population of 1.8 million compared to the Auckland region’s 1.4 million and, with a similar population base, is increasingly being used as a benchmark to compare a wide variety of infrastructure relative to Auckland.

As shown in Figure C2, Brisbane has 15 professional venues, compared to Auckland’s twelve. However, the balance of the venue provision is significantly different, with Brisbane having eight (53%) of the venues with a capacity between 200 and 615 seats. This compares to Auckland’s one venue (Maidment) in this size range. Consequently, Brisbane has a much more diverse mix of venues covering the spectrum from “Off-Off” to “Mainstage”.

Figure C2: Brisbane Professional Venue Mix


(Source: Horwath HTL)

The Queensland Theatre Company (equivalent of ATC) produces an annual "Mainstage" season comprising nine works utilising a diverse range of venues including the Bille Brown Studio, Cremorne, and Playhouse.

There are eight different venue management entities in Brisbane including:

- Queensland Performing Arts Centre (Lyric Theatre, Concert Hall, Playhouse, and Cremorne)
- Brisbane Powerhouse (Powerhouse and Visy Theatres)
- Queensland University of Technology (La Boite, Garden, and The Loft)
- Metro Arts (Studio and Sue Benner Theatre)
- Brisbane City Council (Brisbane City Hall)
- Griffith University (Conservatorium)
- Arts Queensland (Judith Wright Centre)
- Queensland Theatre Company (Bille Brown Studio).

Brisbane has a wide variety of flexible venues that enable a diverse range of performing arts activity within each space. These flexible venues include:

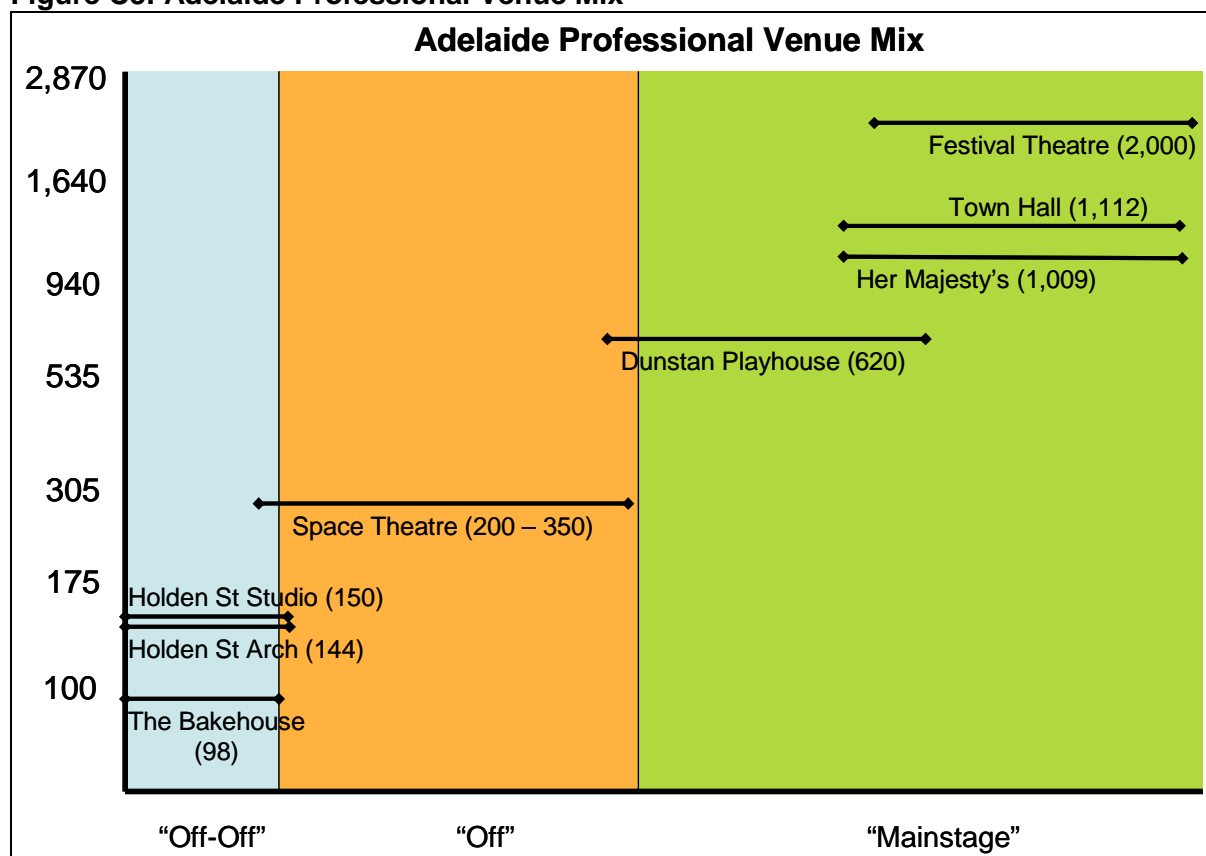
- Cremorne
- La Boite
- Judith Wright
- Bille Brown

- Visy
- Metro Arts Studio
- The Loft.

ADELAIDE

Adelaide has a population of 1.1 million people and has eight professional performing arts venues compared with Auckland's 12 venues. Half of Adelaide's professional venues are managed by the Adelaide Festival Centre, including the Festival Theatre, Her Majesty's, Dunstan Playhouse, and the Space Theatre.

Figure C3: Adelaide Professional Venue Mix



(Source: Horwath HTL)

The State Theatre Company has an eight work season that primarily utilises the Dunstan Playhouse with the Space Theatre being a secondary venue.

While Adelaide does not have the same range of venues as Brisbane, it does have a reasonable spread of venues across the spectrum from "Off-Off" to "Mainstage" with a strong mix of "Off-Off" venues and the flexiform Space Theatre focusing on "Off" theatre requirements.

APPENDIX D: REALISING THE INDUSTRY VISION

Based on our consultation with professional performing arts industry in 2008, we distilled the following vision for the professional performing arts sector in Auckland:

“The sector will have a strong and vibrant interface with its audiences, embracing diversity and responding flexibly to emerging trends, so as to ensure its relevance, quality and sustainable development.”

The key themes implicit in this vision are audience development, diversity, flexibility and identity, all of which contribute to the sustainable development of the sector.

AUDIENCE DEVELOPMENT – GROWING THE AUDIENCE BASE

The sustainability of the sector is ultimately predicated on attracting and growing a stable audience base, ie: an audience base that habitually patronises the performing arts. This involves positioning the performing arts as an attractive entertainment option relative to competing genres (eg: film and sport). Some of the factors that influence this include:

- quality product – Provision of product that meets / surpasses audience expectations at prices that are commensurate with the standard of product. For example experimental / emergent theatre audiences are generally more tolerant of variable product quality, but will also expect low ticket prices, whereas “Mainstage” theatre audiences are less forgiving of poor quality product, particularly in relation to production standards, but are also willing to pay significantly more for their ticket
- pre and post show experience – Patrons are usually looking for a “night out” – an overall package of experiences to complement the actual show. Key facets of the overall experience include the ease of securing a ticket and getting to the venue, immersion in a high energy environment, and the choice of a variety of proximate restaurants and bars for a pre or post show meal or drink. The ability to mingle with actors / performers post show could also potentially provide a strong point of differentiation for this sector
- attractiveness of venue – There are certain elements that tend to increase the attractiveness of a venue, including:
 - ease of getting to venue – This is influenced by the convenience of public transport options and the provision of proximate and affordable car parking
 - ambience of location – A high energy location with proximate complementary and compatible activity (eg: cafés, bars, restaurants, boutique retail, other performing arts venues) and a strong street presence, is more likely to reinforce the sense of “a night out” relative to a quiet, isolated venue location
 - ambience of venue – The architecture of the venue must be congruent with the nature of performance product, in order to reinforce the

atmosphere most conducive to the enjoyment of the show. This ambience will differ depending on whether the venue is focused on supporting “Mainstage”, “Off” or “Off-Off” product

- patron comfort – This includes air conditioning, cleanliness, seat comfort, legroom, acoustics, sightlines and ease of entry / egress. Audience expectations of these amenities vary depending on the nature of the show (eg: “Off-Off” product is usually hosted in low-cost venues with minimal audience amenities, while a high degree of patron comfort / convenience is expected for “Mainstage” product)
- audience participation – The performing arts sector is uniquely placed to play a pivotal role in the healthy development of society – by serving as a lens through which society may view and critique itself, by broadening and challenging perspectives, and by acting as a forum for debate and discussion. 82% of Aucklanders agree that the arts help define who we are as New Zealanders.¹⁸ The extent to which the sector fulfils this role of “cultural facilitator” is influenced strongly by the depth of engagement between practitioner and patron. This engagement in turn is likely to make the performing arts a part of people’s lifestyles, as opposed to “just another entertainment option”, and is increasingly being encouraged in the following ways:
 - engagement at early age – Familiarity with the performing arts sector is being encouraged at an early age (eg: through a school’s arts curriculum)
 - “demystifying” theatre spaces – The perception of performing arts spaces as “elitist” by the general public is being countered by making venues more welcoming (eg: having a café in the venue that is open all day)
 - forums for discussion – Some practitioners we consulted alluded to examples overseas and, to a lesser extent here in New Zealand, of venues that organised workshops for debate and discussion around shows. There is also the potential for online forums.

DIVERSITY OF PRODUCT, VENUE AND CAREER PATH

Diversity is crucial to a lively performing arts sector, from both an audience perspective and a practitioner perspective.

From an audience perspective, diversity refers to the range of art-forms on offer, as well as differentiation within each art-form (ie: “Off-Off”, “Off” or “Mainstage” product). For example, within the “drama theatre” genre, ATC and Silo Theatre product appeal to slightly different audience bases (despite some overlap). A well differentiated sector is likely to encompass and appeal to more of the population by virtue of providing multiple access points and catering for a greater range of tastes and preferences (including different ages and ethnicities). The need for diverse venues

¹⁸ *New Zealanders and the arts: Attitudes, attendance and participation*, Creative New Zealand, 2005

is likely to become increasingly important as Auckland's population becomes increasingly ethnically diverse.

A range of performance spaces, each servicing distinct segments of the sector in a manner that reinforces the brand, culture and nature of work hosted, enables and reinforces this diversity of product. Within performance spaces, the ability to change the appearance of a venue for a particular show can provide a "freshness" that enhances the patron experience.

From a practitioner perspective, diversity of space is vital to enable a range of different works to be performed using different styles and formats. Diversity of venue is also important in providing appropriate venues for practitioners at different stages in their careers. Based on our consultation, the most significant impediment in Auckland to a healthy range of career access points in theatre and dance, at all levels of product, is the severe shortage of venues, which inhibits the ability to put on shows at affordable rates. We have been advised of a number of instances where product created in Auckland has been staged in other New Zealand centres and even overseas, but not in Auckland, due to the lack of suitable venues.

FLEXIBILITY TO ADAPT AND INNOVATE

Based on our consultation, there is a widespread perception that the performing arts sector is evolving at an ever increasing pace. Some of the drivers of change include:

- an increasingly sophisticated and savvy audience with higher expectations from the sector, particularly by virtue of being exposed to more international touring product
- a growing interest in Maori cultural expression
- the increasingly multi-cultural demographic of Auckland, with various immigrant groups seeking their own means of cultural expression
- the growing fusion of cultures which results in product with a unique New Zealand flavour
- the growing audience desire for contemporary New Zealand work
- a growing desire amongst many European New Zealanders to express and re-connect with their heritage
- the desire of the internet generation to "tell its own stories, in its own way"
- a growth in cross-pollination across art-forms (eg: theatre dance, visual arts, multi-media, etc)
- the growth of new technologies (eg: projection / laser technology, computerised fly systems and theatres with multiple stages)
- the growth of the internet as a marketing and distribution channel, and as a forum for debate and discussion
- increased desire for participation at a variety of levels in art forms
- increased understanding of the potential role of arts in other sectors (eg: education, health, corporate).

It is in the dynamism of an evolving sector that new players emerge, and larger players adapt or cease to exist. Venues have a crucial role to play in supporting the emergence of new players and in providing sheltered spaces for larger players to innovate and test new product. In an environment where there is a shortage of venues and lack of diversity of venues, increased competition makes venues either unaffordable or unavailable to emerging artists, which stymies their growth.

Venues servicing the “Off-Off” and “Off” segments, where most experimentation and innovation occur, should ideally play a proactive role in supporting practitioners. This support could be in the form of in-house graphics designers, in-house technical support, producers, marketing / PR support or direct financial support. A venue that is widely considered an excellent example of this proactive approach is BATS in Wellington, which supports the “Off-Off” segment. The Downstage Theatre in Wellington and the Fortune Theatre in Dunedin provide similar support to the “Off” segment.

The level of venue support and intervention does need to be balanced however to ensure it does not become an economic burden to the venue, and does not “interfere” with natural market systems that vet out sub-par product.

Venues can also serve as a physical convergence point for practitioners to come together and discuss new ideas. New product is often created out of this “meeting of minds”.

IDENTITY – ONE VOICE, MULTIPLE FACES

The theme of identity relates to strengthening the identity of the sector as a whole and the identity of the various participants within the sector. Strengthening this identity includes creating “physical anchors” to give it shape and form in people’s minds. Venues can be an important “physical anchor”.

Venue clusters can play a significant role in reinforcing the identity of the sector as a whole. A concentrated cluster of venues in a precinct is more likely to represent a strong physical identity for the performing arts than if the same venues were spread over a larger geographic area. This principle is illustrated by the concept of retail precincts – the concentration of similarly positioned shops creates a gestalt that reinforces the identity of the precinct as a shopping destination, rather than a mere collection of shops. Examples of performing arts precincts include New York’s Broadway theatre district and London’s West End. The Aotea Quarter, with its existing venues, provides a good opportunity to further develop a more significant and comprehensive performing arts and theatre district.

Individual venues can represent certain types of work, certain ambiances, certain brands, and certain companies / practitioners, with each element complementing the other. A “home venue” for a company / practitioner can reinforce the identity of the company / practitioner by allowing greater control over the “ambience” of the space, greater control over the overall patron experience (including ticketing and the pre and post show experience) and greater flexibility in reconfiguring the venue for a

particular show. Based on our consultation, there appears to be a significant consensus that “home venues” are needed for ATC, Silo Theatre and the smaller “independent” practitioners that will reinforce their identities and strengthen their brand.

It must be emphasised that a “home venue” does not mean that the venue is run by, or used exclusively by, any one company / practitioner. Instead, the sense of a “home venue” will evolve through:

- providing a venue that has an exclusive arts focus
- providing a venue that meets the overall needs of practitioners and the audiences
- the achievement of the two factors above resulting in regular use of the venue by specific companies and the public thereby associating venues with specific companies.