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# TOWNSVILLE CONCERT HALL DETAILED BUSINESS CASE

SERVICE NEEDS ASSESSMENT

DEPARTMENT OF INFRASTRUCTURE, TRANSPORT, REGIONAL  
DEVELOPMENT, COMMUNICATIONS AND THE ARTS

JULY 2023

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# EXECUTIVE SUMMARY

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## BACKGROUND

Signed in December 2016, the Townsville City Deal is a 15-year commitment between all three tiers of government that aims to support a prosperous economic future for Townsville as a vibrant, liveable and innovative city, and unlock the potential for business and industry development. The Townsville City Deal Partners have commissioned a Detailed Business Case (DBC) into the development of a concert hall in Townsville to allow the group to evaluate the proposed development and determine their support. AEC, AECOM and Blight Rayner have been engaged by the Australian Government (on behalf of the Townsville City Deal Partners) to deliver the Detailed Business Case.

The purpose of this report is to articulate the service need and demand for a concert hall in Townsville. This report informed all other components of the DBC.

## KEY FINDINGS

### Current State of Performing Arts

Townsville has a thriving and active arts and cultural sector, with high and growing levels of participation and attendance. Townsville's main performing arts venues are owned and operated by Townsville City Council (TCC). The premier performing arts facility in the region is the Townsville Civic Theatre (TCT), a 1,066-seat proscenium arch theatre located in Reid Park which was built in 1978. Key findings regarding the current landscape of performing arts in Townsville include:

- Townsville Civic Theatre is the only purpose-built, large-scale performing arts venue in Townsville.
- Literature review and consultation has identified a lack of suitable venues catering to a full spectrum of performing arts activities, which is a key barrier to growing Townsville's arts and cultural sector. In particular, there is a perceived gap in provision of acoustic-based venues, as well as high quality, purpose-built small and/ or medium-sized performing arts facilities to support the TCT.
- There are significant venue availability constraints in Townsville; Townsville Civic Theatre is expected to reach 82.3% occupancy in 2022 and is expected to turn away 48 booking days (not including forgone performances which did not enquire with the venue).
- Consultation identified there to be known demand for 331 performance days<sup>1</sup> and 428 booking days<sup>2</sup> for high quality performing arts venues in Townsville including current performances and forgone opportunities. Of these performance days, 194 are best suited to a theatre facility (58.7%) and 137 are best suited to a concert hall (41.3%).
- In 2022, Townsville is expected to host 265 known performance days and 342 booking days (excluding performances held at the Townsville Entertainment and Convention Centre or Queensland Country Bank Stadium). This is comprised of 172 performance days (64.9%) which would be best suited to a theatre venue and 93 performance days (35.1%) would be best suited to a concert hall.
- Of the known performance days expected to be hosted in Townsville in 2022, Townsville Civic Theatre is expected to host approximately 232 performance days (with 300 booking days). This is comprised of 148 performance days (63.7%) which would be best suited to a theatre and 84 performance days (36.3%) which would be better suited to an acoustic venue.
- In addition to the known performance days, it is estimated that Townsville has forgone 66 performance days (with 85 booking days) in 2022 due to the lack of availability in existing venues and the lack of a suitable venue

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<sup>1</sup> Performance days refers to the number of days in which a venue is booked and at least one performance is held.

<sup>2</sup> Booking days refers refer to the days in which a venue is booked and comprises the performance days as well as the bump-in bump-out time required.

for acoustics-based performances. The majority of these missed opportunities are orchestral performances that would utilise an acoustic-based venue.

- For performances on the Townsville event calendar which are best suited to a theatre venue, audiences are expected to range from 75 to around 1,000 attendees and average around 500 attendees. For performances which are best suited to a concert hall, there is expected to be sufficient demand to attract from around 165 to over 1,000 attendees and average around 500 attendees.
- There is expected to be sufficient demand for theatre-based performances to attract more than 110,200 attendances including current and forgone performances while concert-hall performances are expected have demand sufficient demand for around 90,800 attendances.

### Drivers for Demand

There are two key drivers for demand for performing arts facilities in Townsville: population growth and attraction of major performance events. These are examined in more detail below.

- As the population grows, so too will the potential audience for live performances. In the 20 years to 2041, Townsville LGA is projected to record average annual population growth of 1.6% to reach a population of approximately 275,700.
- There is estimated to be demand within the Townsville population for approximately 377,800 live event attendances in 2022. This is projected to increase to approximately 505,400 event attendances in 2041 at an average annual growth rate of 1.5%.
- Nationally significant events including the AFCM, the Australian Concerto and Vocal Competition, and performances by state and national acoustic-based performance groups will be significant drivers of the demand for the proposed concert hall.
- Based on indicative findings from consultations, if Townsville had a suitable acoustics-based venue and greater venue availability, state and national acoustic-based performance groups would increase their annual visitation/ performances in Townsville by more than five times their current visitation/ performances on average (noting this is from a relatively small base).

### Future Demand for Performing Arts

Understanding future demand for the proposed Concert Hall and the existing TCT is important to estimate the optimal audience capacity of the Concert Hall, to ensure TCT will be sufficiently alleviated of demand to allow more bookings to be accepted, and to ensure both venues will be sufficiently occupied to ensure their ongoing success. The findings of the future demand projections are below.

- Townsville is expected to have demand for 364 performance days (471 booking days) in 2041 for performance types that are currently attracted to Townsville (including performances held as well as those foregone due to capacity constraints at existing facilities), an average annual increase of 1.1% on the 297 performance days demanded in 2022.
- Townsville is also estimated to have foregone demand for 34 performance days (44 booking days) as a result of not having an acoustic facility in 2022; this is expected to increase to 45 performance days (58 booking days) by 2041.
- Of the 297 performance days demanded for existing venues in Townsville in 2022, 104 performance days are estimated to be for performances which would be better suited to an acoustic facility. This is expected to increase to 128 performance days in 2041. Including foregone demand for performances which require an acoustic facility, there is estimated to have been sufficient demand for 138 performance days in an acoustic facility in 2022 and 173 performance days in 2041.
- Of the 297 performance days demanded for existing venues in Townsville in 2022, there is estimated to be 195 performance days for performances which are best suited to a theatre venue, which is expected to increase to 236 days in 2041.

- By 2041, performances which attract between 700 and 850 attendees are expected to represent the largest proportion (34.6%) of performances demanded for existing theatre venues.
- By 2041, performances which attract demand for between 500 and 700 attendees are expected to represent the largest proportion (45.4%) of performances demanded for acoustic facilities in Townsville.

### Service Need

It is clear that Townsville's current cultural infrastructure is limiting the development of the performing arts industry in Townsville. The identified service need for Townsville is outlined below.

- Townsville's current cultural infrastructure is limiting the development of the performing arts industry in Townsville. The most significant gap in the city's performing arts facilities was identified to be a venue suitable for large acoustic performances (a concert hall). A small black-box performance space to support additional local or smaller touring productions was identified as a secondary service need.
- There is expected to be significant demand for a concert hall in Townsville. The addition of a concert hall in the region is expected to enhance the cultural landscape in Townsville, increase the quality of acoustic performances and stimulate economic growth in Townsville.
- By 2041, 79.8% of concert hall-based performances in Townsville are expected to attract audience sizes of between 300 and 700 attendees, with 15.5% expected to provide sufficient demand for audiences of more than 700 attendees. The Townsville Concert Hall is recommended to be designed to cater to an audience of 1,000 to ensure its ability to accommodate the small number of culturally significant acoustic-based events with large audiences that the facility is expected to attract. The facility is recommended to not exceed a seating capacity of 1,000 to retain an intimate performance atmosphere for the majority of performances which will be in the 300 to 700 audience range.
- With the addition of a concert hall, TCT will remain a premier theatre performance facility in Townsville with many performance types being best suited to a theatre venue. With demand for acoustic performances accommodated by a new concert hall, the TCT will have the capacity to host more performances which are better suited to a theatre venue and more performances which are unable to be scheduled as far in advance as is necessary.
- Without a new acoustic-based facility in Townsville, there will be no further expansion in either theatre or acoustic-based performing arts, which will also limit the future viability of hosting nationally significant events currently hosted in Townsville.
- As Townsville has already begun missing opportunities for performing arts events and cultural development, the need for additional cultural infrastructure and a solution to the identified service need is immediate.

### Benefits of the Project

The development of the Townville Concert Hall will bring a range of benefits to performing arts audiences, performing arts employees, and the wider community. Such benefits include the following:

- **Number of Performances:** Increase in number of visual art performances (acoustic and theatre) in Townsville
- **Quality of performances:** Increase in quality of visual art performances (acoustic and theatre) in Townsville.
- **Audience Amenity:** Increase in quality, variety and availability of performing arts shows in Townsville
- **Development of the Arts:** Build demand over time for opportunities to further development of the arts in Townsville, such as the establishment of a regional conservatorium.
- **Development of local First Nations Performing Artists:** Support the development and exposure of local First Nations performing artists and groups by providing access to performing arts facilities.
- **Tourist visitation:** Increase in cultural tourism visitation to Townsville City.

- **Employment:** Increase in employment opportunities in Townsville (both direct arts and indirect business activity).
- **Business activity:** Increase in existing business activity and creation of new business opportunities in Townsville.
- **Taxation revenue:** Increased taxation revenue to all levels of government from increased economic activity.
- **Social Benefits:** Promotion of growth in cultural sector leading to improved health and well-being, social inclusion and local social capital.

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# 1. INTRODUCTION

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## 1.1 BACKGROUND

Signed in December 2016, the Townsville City Deal is a 15-year commitment between all three tiers of government that aims to support a prosperous economic future for Townsville, position Townsville as a vibrant, liveable and innovative city, and unlock the potential for business and industry development.

The Townsville City Deal is being delivered through a range of commitments across six key initiatives. One of these initiatives includes a focus on establishing Townsville as the capital of North Queensland, including a commitment to the delivery of new cultural and entertainment infrastructure.

The Townsville City Deal aims to realise its commitments by consolidating and building on existing research and analysis undertaken by Townsville City Council and the Queensland and Australian Governments. Over the past 20 years, a series of position papers, planning reports and feasibility assessments have been commissioned outlining the need for additional arts facilities in Townsville (including both visual and performing arts). The key findings from work completed to date highlights a need for investment in arts infrastructure, to accommodate the growing demand for performing and visual arts in the Townsville region.

The Townsville City Deal Partners have commissioned a Detailed Business Case (DBC) into the development of a concert hall in Townsville to allow the group to evaluate the proposed development and determine their support. AEC, AECOM and Blight Rayner have been engaged by the Australian Government (on behalf of the Townsville City Deal Partners) to deliver the DBC.

## 1.2 PURPOSE OF THIS REPORT

The purpose of this report is to articulate the service need and demand for a new performing arts facility in Townsville. This report examines the service need for the proposed concert hall based on a combination of literature reviews, consultation and demand analysis. This report examines the existing supply of similar facilities in the region with which a concert hall in Townsville may compete, estimates the demand for a concert hall and a theatre in Townsville, identifies the service need for Townsville and evaluates the benefits associated with actioning the service need. The service need report informed all other components of the DBC.

## 1.3 APPROACH

The approach taken for the Service Needs Assessment involved the following elements.

- **Current state of performing arts (Chapter 2):** Identifies the current landscape of performing arts facilities in Townsville and estimates the current and forgone demand for performing arts venues in the region.
- **Drivers for demand for performing arts (Chapter 3):** Outlines the key drivers for an acoustic performing arts venue in Townsville.
- **Future demand for performing arts (Chapter 4):** Outlines the projected future demand for theatre and concert hall venues in Townsville.
- **Service need (Chapter 5):** Identifies the service need for Townsville based on the demand analysis.
- **Benefits of the project (Chapter 6):** Lists the benefits of addressing the service need.
- **Investment logic map (Chapter 7):** Identifies the response needed to address the service need while achieving the range of benefits sought.
- **Stakeholders (Chapter 8):** Provides a summary of the stakeholder engagement responsibilities and the identification of key stakeholders.



## 2. CURRENT STATE OF PERFORMING ARTS

### KEY FINDINGS

- Townsville Civic Theatre is the only purpose-built, large-scale performing arts venue in Townsville.
- Literature review and consultation has identified a lack of suitable venues catering to a full spectrum of performing arts activities, which is a key barrier to growing Townsville's arts and cultural sector. In particular, there is a perceived gap in provision of acoustic-based venues, as well as high quality, purpose-built small and/ or medium-sized performing arts facilities to support the TCT.
- There are significant venue availability constraints in Townsville; Townsville Civic Theatre is expected to reach 82.3% occupancy in 2022 and is expected to turn away 48 booking days (not including forgone performances which did not enquire with the venue).
- Consultation identified there to be known demand for 331 performance days<sup>3</sup> and 428 booking days<sup>4</sup> for high quality performing arts venues in Townsville including current performances and forgone opportunities. Of these performance days, 194 are best suited to a theatre facility (58.7%) and 137 are best suited to a concert hall (41.3%).
- In 2022, Townsville is expected to host 265 known performance days and 342 booking days (excluding performances held at the Townsville Entertainment and Convention Centre or Queensland Country Bank Stadium). This is comprised of 172 performance days (64.9%) which would be best suited to a theatre venue and 93 performance days (35.1%) would be best suited to a concert hall.
- Of the known performance days expected to be hosted in Townsville in 2022, Townsville Civic Theatre is expected to host approximately 232 performance days (with 300 booking days). This is comprised of 148 performance days (63.7%) which would be best suited to a theatre and 84 performance days (36.3%) which would be better suited to an acoustic venue.
- In addition to the known performance days, it is estimated that Townsville has forgone 66 performance days (with 85 booking days) in 2022 due to the lack of availability in existing venues and the lack of a suitable venue for acoustics-based performances. The majority of these missed opportunities are orchestral performances that would utilise an acoustic-based venue.
- For performances on the Townsville event calendar which are best suited to a theatre venue, audiences are expected to range from 75 to around 1,000 attendees and average around 500 attendees. For performances which are best suited to a concert hall, there is expected to be sufficient demand to attract from around 165 to over 1,000 attendees and average around 500 attendees.
- There is expected to be sufficient demand for theatre-based performances to attract more than 110,200 attendances including current and forgone performances while concert-hall performances are expected have demand sufficient demand for around 90,800 attendances.

### 2.1 OVERVIEW OF TOWNSVILLE'S PERFORMING ARTS SECTOR

Townsville has a thriving and active arts and cultural sector, with high and growing levels of participation and attendance. There are around 190 cultural organisations in Townsville including a significant number of music organisations such as the Barrier Reef Orchestra and the Eisteddfod as well as theatre and dance companies such as the nationally and internationally acclaimed contemporary dance company Dancenorth, Theatre iNQ, and Full Throttle Theatre Company (Bott, 2017; Townsville City Council, 2017b). There are several amateur musical theatre

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<sup>3</sup> Performance days refers to the number of days in which a venue is booked and at least one performance is held.

<sup>4</sup> Booking days refers refer to the days in which a venue is booked and comprises the performance days as well as the bump-in bump-out time required.

and choral groups in Townsville as well as over 30 tuition schools and academies in all disciplines, while performance, music, and dance are a part of the curriculum for many schools in the region (Townsville City Council, 2017b).

Townsville is also home to several significant musical events, including (Townsville City Council, 2017b):

- Townsville hosts the Australian Festival of Chamber Music, the largest chamber music festival in the Southern Hemisphere, which attracts well over half its audience annually from interstate.
- The annual junior Eisteddfod hosts some 2,000 entries in 300 competitive events held over 18 days. Altogether, these result in about 4,600 individual performances and audience attendances exceeding 20,000.

Cultural activities and events are also key attractors of visitation to the Townsville, with three of the five top visitation destinations in Townsville being cultural facilities in the Townsville Civic Theatre, Perc Tucker Gallery, and Reef HQ (Bott, 2017).

Townsville's arts and recreation services industry is estimated to have employed over 1,300 people in 2020-21, of which approximately 380 are estimated to have been employed within the heritage, creative and performing arts sector (AEC, 2022) – accounting for approximately 0.4% of total employment in the Townsville local government area (LGA). These creative and performing arts sector employees are indicatively estimated to have produced \$31.4 million in gross value added (GVA) activity in 2020/21 (AEC, 2022).

## 2.2 CURRENT PERFORMANCE SPACES IN TOWNSVILLE

Townsville's main performing arts venues are owned and operated by Townsville City Council (TCC). The premier performing arts facility in the region is the Townsville Civic Theatre (TCT), a 1,066-seat proscenium arch theatre located in Reid Park which was built in 1978. Despite its age, the TCT remains a high-quality theatre venue and the only purpose-built, large-scale performing arts venue in Townsville. Various alterations and improvements have been undertaken, with the most recent in 2017/18 which included upgrades to a range of equipment and digital technologies to meet the evolving needs of professional performing artists. The theatre also received significant damage as a result of the 2019 floods which severely impacted the theatre's programme for an 8-month period while extensive repairs were undertaken. While the TCT is 40 years old, the recent significant refurbishments, improvements and repairs to the venue ensure it remains a high-quality performing arts facility.

As the premier performing arts facility in Townsville, the TCT is in high demand and is currently booked out at least two years in advance, thus limiting the attraction of new touring artists and events and restricting availability for organisations who are unable to plan multiple years in advance.

In addition to the primary theatre space, the TCT also has a black-box style performance space – C2 theatre (an adjunct to the Townsville Civic Theatre – 240 seat capacity). The other black-box style performance space, the Riverway Arts Centre, was closed due to flooding in 2019 is being repurposed by TCC for an alternative use.

TCC also owns The School of the Arts (190 capacity) which is used by Dancenorth (a professional dance company). This facility is not a purpose-built performing arts space and its heritage listing constrains its ability to be redeveloped to better suit the needs of the performing arts community. Previously, the Old Magistrates Court (also owned by TCC) could be used for small performances and was commonly used by Full Throttle Theatre Company. This venue closed towards the end of 2021 for repairs to the floor and has not been used since. The future of the venue is yet to be determined.

Other notable facilities in Townsville that may be suitable for performing arts use include:

- Pimlico High School Performing Arts Centre (PIMPAC), a 250-seat capacity theatre with a stage and wings.
- The Carlyle Gardens Hall, a 500-seat auditorium with a proscenium arch, stage, reasonable sound and lighting equipment, located within the Carlyle Gardens retirement village in Condon. However, it should be noted this facility is not purpose-built for performing arts and caters to a broad range of events and uses of the retirement village.

In addition to the above there are a number of other facilities in Townsville and the surrounding region that can cater to some performing arts activities, however, these facilities are typically either broader-use facilities designed

to cater to a wide range of events and exhibitions (e.g. the Townsville Entertainment and Convention Centre, Queensland Country Bank Stadium, as well as a number of multi-use halls and events spaces).

A summary of relevant available facilities is presented the table below.

**Table 2.1. Primary Performing Arts Facilities in Townsville**

Venue	Description	Size / Capacity	Owner
Townsville Civic Theatre	Theatre with 12m x 15.3m stage. Not suitable for musical performances that require acoustic quality. Back of house facilities were originally built in 1978 but were upgraded in 2009.	1,066	Townsville City Council
C2 at the Civic Theatre	Black box style performance space - an adjunct to the Townsville Civic Theatre	240	Townsville City Council
Old School of Arts Building (Dancenorth Headquarters)	Heritage building with auditorium, a stage area, and dressing room bay.	190	Townsville City Council
PIMPAC – Pimlico High School facility	10m x 7m stage, 3m wings, and dressing rooms.	250	Pimlico State School (Queensland Government)
Carlyle Gardens Hall	Proscenium arch, stage, reasonable sound, and lighting equipment, adequate change rooms. Suitable for local theatrical and musical theatre presentations.	500	Private
The Ville Resort – Pavilion	Flexible facility and can be divided into smaller spaces to cater for smaller events. Used for business functions and awards nights, and private functions.	700	Private

Sources: Townsville Community Information Centre 2022, Townsville City Council 2017b, Bott Report 2017, and Arcadis 2017.

## 2.3 DEMAND FOR PERFORMANCE SPACE IN TOWNSVILLE

In quantifying the demand for performances spaces in Townsville this report primarily relies on measures of booking days, performance days and performances.

**Performance days** refer to the days in which a venue is booked and at least one performance is being held. Where multiple performances are held by an organisation on a single day these are considered one performance day.

**Booking days** refer to the days in which a venue is booked and comprises the performance days as well as the bump-in bump-out time required.

**Performances** refer to the number of performances occurring over the period. Where multiple performances are held by an organisation on a single day each performance is counted separately.

Booking days and performance days are used to measure the occupancy of a venue and provide an accurate representation of the calendar of events in Townsville while audience sizes are measured in terms of performances.

### 2.3.1 Current Facility Use

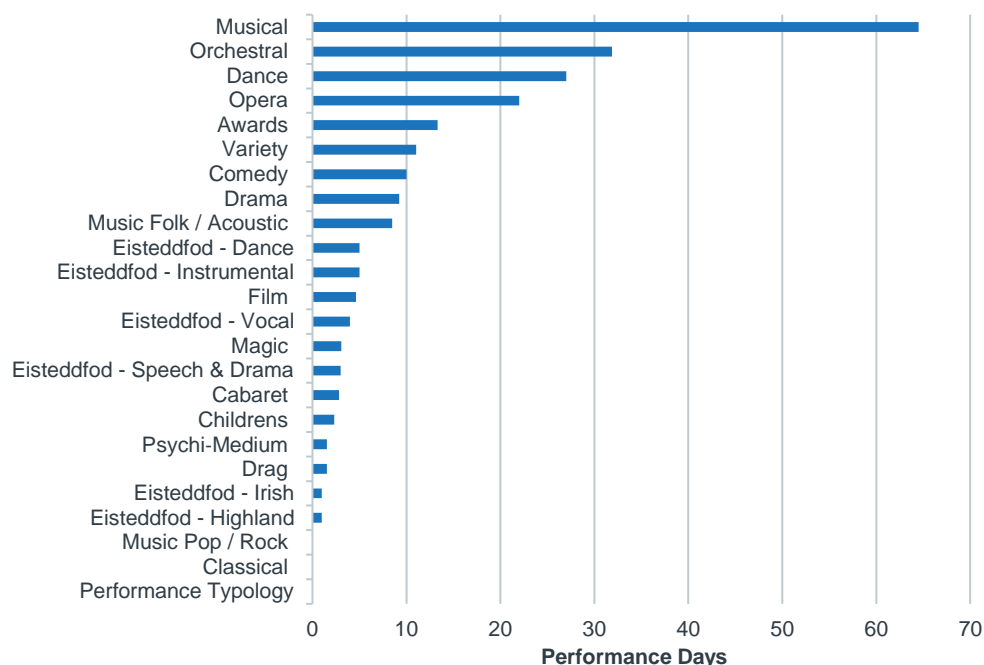
#### **Total Performance Days**

As the premier performing arts facility in Townsville, the TCT is key to understanding the current landscape of performing arts in Townsville. To examine facility use, a 2022 event calendar for the TCT was developed based on information provided by TCT (see Appendix B for further detail).

In 2022, TCT hosted approximately 232 performance days, comprising 300 booking days, across the main theatre and C2 theatre (with the vast majority held in the main theatre). Musicals, including those by local schools, are expected to represent the greatest number of performances with approximately 65 performances days expected in 2022. Following musicals, orchestral performances were the greatest users of the theatre with 32 performance days held annually. This demand stems largely from local festivals and events including the Australian Festival of

Chamber Music (AFCM) and the Australian Concerto & Vocal Competition with 14 performance days held at the TCT between the two. Dance performances were also significant users of high-quality performance spaces with approximately 27 performances days held annually, including those by local, state and national dance companies.

**Figure 2.1. Performance Days in Townsville Civic Theatre, 2022**



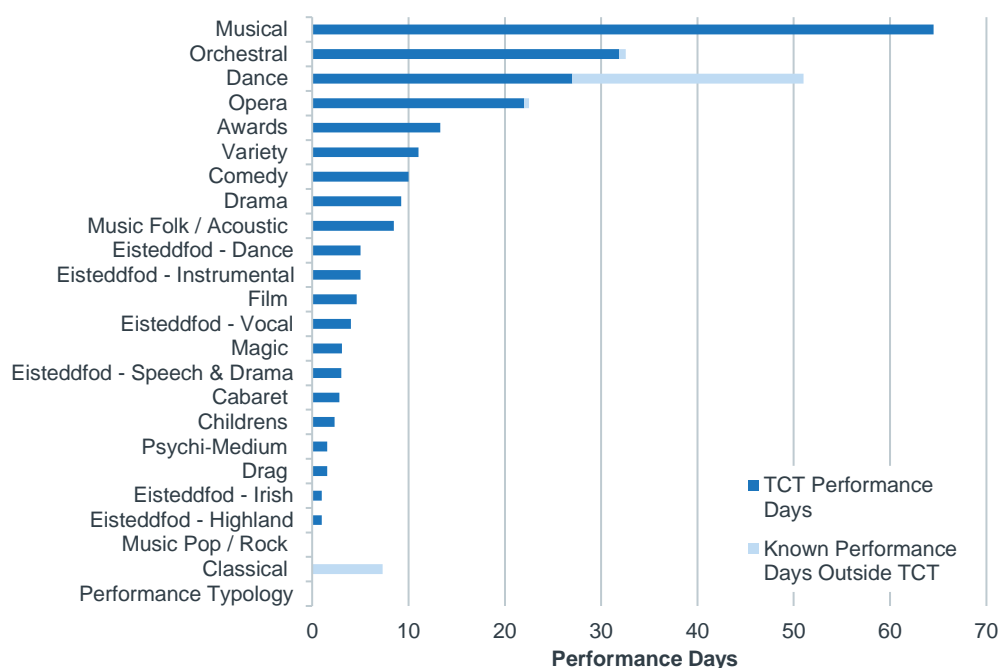
Source: TCT (unpublished), AEC (unpublished)

While TCT is the premier performance arts facility in Townsville, as outlined in section 2.2, there is also a number of other facilities in Townsville capable of supporting live performance arts events. However, information was not available through desktop research or consultation to accurately quantify the number of live performance events held in these facilities.

Even so, consultation was performed to mitigate the risks associated with a reliance on TCC data and to diversify sources. Through the consultation process, a limited number of additional live performance events held outside the TCT in Townsville were identified. In understanding the current usage of performance spaces in Townsville more broadly, AEC added these identified events to the TCT events calendar (resulting in 265 known live performance events days in Townsville), noting this excludes performances held at the Townsville Entertainment and Convention Centre or Queensland Country Bank Stadium on the basis that the large-scale events held at these venues are unlikely to demand space at a dedicated performing arts venue. These events were found from information provided directly by local stakeholders (including AFCM and TCT), desktop research and consultations with local, state and national organisations (see Appendix B for further detail). The additional events include known festival and event performances and occasional performances held outside TCT. Some of these additional events were derived from 2019 bookings on the assumption that, for those events, the bookings held in 2019 would also be held in 2022.

The greatest number of additional performance days came from dance performances, often held in dance studios or venues unique to the performance. There are also a substantial number of additional classical music performance days which are held outside of TCT. These are largely accounted for by the AFCM which, due to availability constraints at the TCT, often utilises The Ville Resort and other venues around Townsville.

**Figure 2.2. Known Performance Days at Performing Arts Spaces in Townsville, 2022**



Source: TCT (unpublished), AEC (unpublished)

### **Performance Days by Activity Type**

To assist in understanding potential demand for a new performance arts facility and the type of facility that may be preferred, AEC performed a venue preference overlay assessment to the event types listed in Figure 2.2. Each performance on the 2022 event calendar was categorised by performance type and each performance type was allocated to the most suitable venue between a theatre and a concert hall.<sup>5</sup> Industry experts were then consulted to verify the venue preference allocations, with the results listed below. It should be noted that though some performance types may be able to use both a concert hall and a theatre venue, the allocation below represents a preference. Where a performance type is equally suited to both venue types it has been allocated to both, if a performance type would be better suited to one venue type over the other it has been allocated accordingly.

**Table 2.2. Venue Allocation by Performance Type**

Performance Type	Preferred Venue Type
Comedy	Concert hall / Theatre
Dance	Theatre
Variety	Theatre
Music - Pop / Rock	Theatre
Music - Folk / Acoustic	Concert Hall / Theatre
Awards	Theatre
Eisteddfod – Instrumental	Concert Hall / Theatre
Eisteddfod – Vocal	Concert Hall / Theatre
Eisteddfod – Speech & Drama	Concert Hall / Theatre
Eisteddfod – Highland	Theatre
Eisteddfod – Irish	Theatre
Eisteddfod - Dance	Theatre
Orchestral	Concert Hall
Chamber Music	Concert Hall
Opera	Concert Hall / Theatre

<sup>5</sup> A breakdown of the difference between a theatre and a concert hall has been included in Appendix A.

Performance Type	Preferred Venue Type
Jazz	Theatre
Classical	Concert Hall
Musical	Theatre
Magic	Theatre
Spoken Word	Concert Hall / Theatre
Cabaret	Theatre
Film	Theatre
Children's	Theatre
Drama	Theatre
Drag	Theatre
Psychi-Medium	Theatre

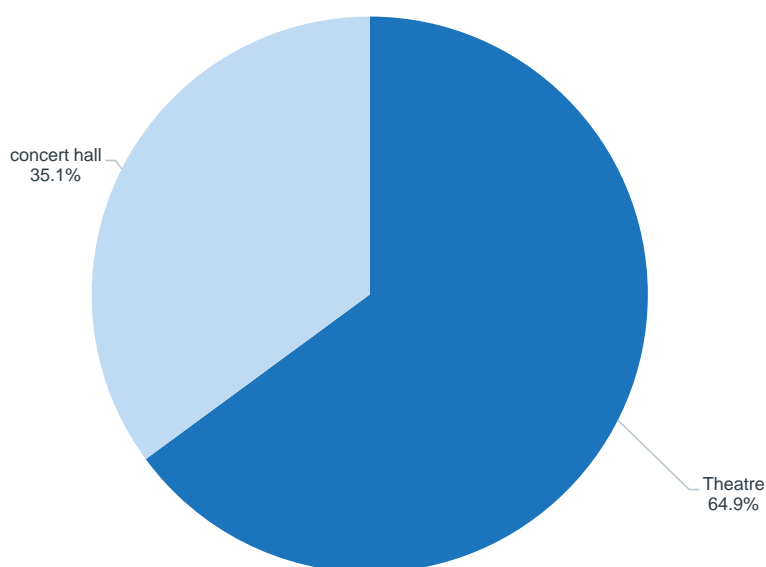
Note: Consideration was made that Music – Pop/Rock and Jazz may have a preference for a concert hall over (or equal to) a theatre, however, to be conservative, a preference for theatre has been applied as per advice from industry experts.  
Source: Consultation with industry experts

### Performance Days by Preferred Facility Type

Most of the known performances held at performing arts facilities in Townsville are best suited to a theatre facility. Of the 265 known performance days held in Townsville, 172 (64.9%) were identified as being best suited to a theatre venue. Of the 232 known performance days held at the TCT, 148 (63.7%) were identified as being best suited to a theatre facility.

While the majority of performances held at the TCT and other performance spaces are best suited to theatre-style facilities, a substantial proportion of the performances held at TCT and other performance arts spaces are acoustics-based and would be better suited to a concert hall (or acoustics-based) facility. Of the 265 performance days held in high-quality performance spaces in Townsville, 93 (35.1%) would be better suited to a concert hall facility. Of the 232 performance days currently hosted by TCT, 84 (36.3%) would be better suited to a concert hall facility.

**Figure 2.3. Preferred Venue Type for Known Performance Days in Townsville, 2022**



Note: When a performance type could be held in either a concert hall or a theatre venue it has been allocated to a concert hall.  
Source: TCT (unpublished), AFCM (unpublished), AEC (unpublished)

### **Performance Audience Sizes**

Known performances in Townsville in 2022 which are best suited to a concert hall venue are estimated to attract a similar number of attendees to performances which are best suited to a theatre venue. Performances best suited to a theatre are estimated to attract between around 75 and 1,000 attendees with an average of around 500 attendees. Performances best suited to a concert hall are estimated to attract between around 170 and 1,000 attendees and are also estimated to average around 500 attendees. The maximum audience size of current performances is limited by the capacity of current venues. Though TCT has 1,066 seats, the venue will typically sell-out with a few seats remaining, meaning the largest performances the venue hosts have approximately 1,000 attendees.

The largest portion of known performances in Townsville in 2022 which are best suited to a theatre venue are expected to attract an audience fewer than 300 people, representing 25.5% of such performances. Audiences of between 500 and 850 people are also common at performances best suited to a theatre with performances attracting 700 to 850 people accounting for 22.4% and performances attracting 500 to 700 people accounting for 23.2%. Most of the known performances in 2022 which are best suited to a concert hall facility are expected to attract an audience of between 300 and 500 people representing 69.4% of such performances. Performances attracting 500 to 700 attendees are also expected to be common currently representing 21.7% of known performances.

**Table 2.3. Estimated Audience Size of Current Performances, 2022, Townsville**

<b>Audience Size</b>	<b>Number of Performances</b>	<b>Proportion of Performances</b>
<b>Theatre-Based Performances</b>		
Less Than 300	48	25.5%
300 to 500	40	21.1%
500 to 700	44	23.2%
700 to 850	43	22.4%
Greater Than 850	15	7.8%
<b>Total</b>	<b>190</b>	<b>100.0%</b>
<b>Concert Hall-Based Performances</b>		
Less Than 300	4	3.0%
300 to 500	93	69.4%
500 to 700	29	21.7%
700 to 850	2	1.5%
Greater Than 850	6	4.5%
<b>Total</b>	<b>134</b>	<b>100.0%</b>
<b>Total Combined</b>	<b>323</b>	<b>100.0%</b>

Source: TCT (unpublished), AFCM (unpublished), AEC (unpublished)

### **2.3.2 Forgone Opportunities**

#### **Total Forgone Performance Days**

Townsville has forgone opportunities for performing arts events due to the limited availability of existing facilities and the lack of appropriate facilities for some performance types. To understand the forgone opportunities for Townsville, consultations were held with various local, state and national performing arts organisations and TCT provided information regarding bookings they were forced to decline as a result of availability constraints (see Appendix B for further details). It was also identified that some opportunities missed at the TCT were subsequently held at a different venue in Townsville; these missed opportunities for the TCT held elsewhere in Townsville were not included as a forgone opportunity for Townsville.

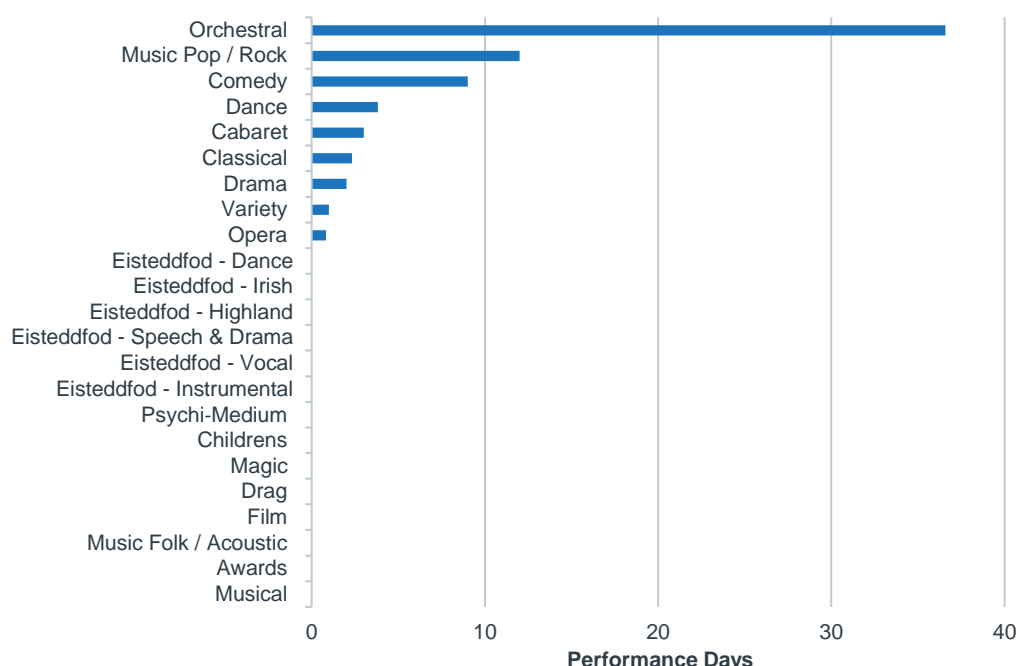
During stakeholder consultation, various local, state and national organisations revealed their likelihood of performing in Townsville under a scenario in which Townsville had a dedicated acoustics-based facility. For organisations that could not be engaged through consultation, the average additional visitation of similar organisations was used as an estimate for their propensity to travel to Townsville under a scenario in which Townsville had a concert hall. This approach assumed that a range of flexible hire arrangements will be employed

to attract various performing organisations. This may refer to reduced fees for community organisations, negotiated hire arrangements, revenue sharing or direct council support. This is in line with current standard practice at facilities in Townsville, including the TCT, and elsewhere in Australia.

While consultation was undertaken with a range of organisations that may be attracted to Townsville under a scenario in which Townsville has a concert hall, this is unlikely to be an exhaustive list and, as such, there may be other foregone opportunities that were unable to be identified for inclusion in the assessment.

It is estimated that Townsville has forgone 66 performance days in 2022 due to the lack of availability in existing venues and the lack of a suitable venue for acoustics-based performances. The largest proportion of these missed opportunities are orchestral performances, largely due to the impact of the AFCM which would host substantially more performances if there was additional venue availability and a venue that better suited their needs. Stakeholder consultation has also indicated that increased visitation from state and national orchestras would occur should suitable facilities exist.

**Figure 2.4. Forgone Opportunities for Performance Days, Townsville**



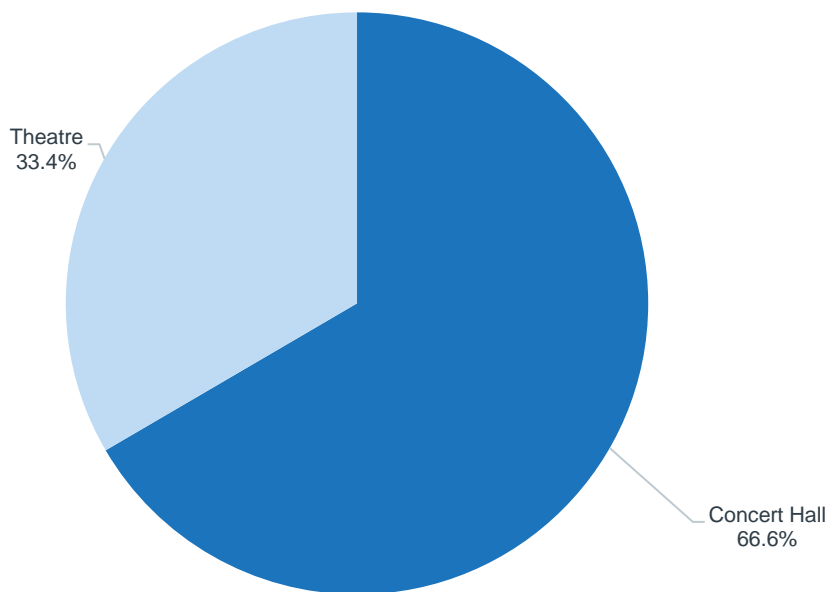
Source: TCT (unpublished), AFCM (unpublished), AEC (unpublished)

**Forgone Performance Days by Preferred Facility Type**

Unlike current facility use, most of the identified performances forgone in Townsville in 2022 by not having either sufficient availability in existing venues or a suitable acoustics-based facility are best suited to a concert-hall venue. Of the 66 performance days forgone by Townsville, 44 (66.6%) were best suited to a concert hall. There remaining 22 performance days (33.4%) were identified as being best suited to a theatre-style facility. For these forgone opportunities that would prefer a theatre-style facility, while they may not directly demand space at a concert hall facility, a concert hall would help in meeting this demand by reallocating other events and thereby increasing availability of existing theatre venues.



**Figure 2.5. Preferred Venue Type for Forgone Performances in Townsville, 2022**



Source: TCT (unpublished), AFCM (unpublished), AEC (unpublished)

Note: When a performance type could be held in either a concert hall or a theatre venue it has been allocated to a concert hall.

#### **Forgone Performance Expected Audience Sizes**

Forgone performances which are best suited to a theatre are expected to have a larger audience size than performances which are best suited to a concert hall. The demand for forgone performances which are best suited to a theatre venue is expected to range from around 300 to 1,000 attendees and average around 600 attendees. The demand for forgone performances which are best suited to a concert hall venue is expected to range from around 170 to over 800 people and average around 500 attendees.

The vast majority of forgone performances which are best suited to a theatre venue are expected to attract an audience of 500 to 700 people, representing 85.3% of forgone theatre-based performances. Most forgone performances which are best suited to a concert hall venue are also expected to attract demand for an audience of 500 to 700 people, representing 51.6% of such performances. Forgone performances of 300 to 500 attendees are also expected to represent a substantial proportion of concert hall-based performances at 39.5%.

**Table 2.4. Estimated Audience Size of Forgone Performances, 2022, Townsville**

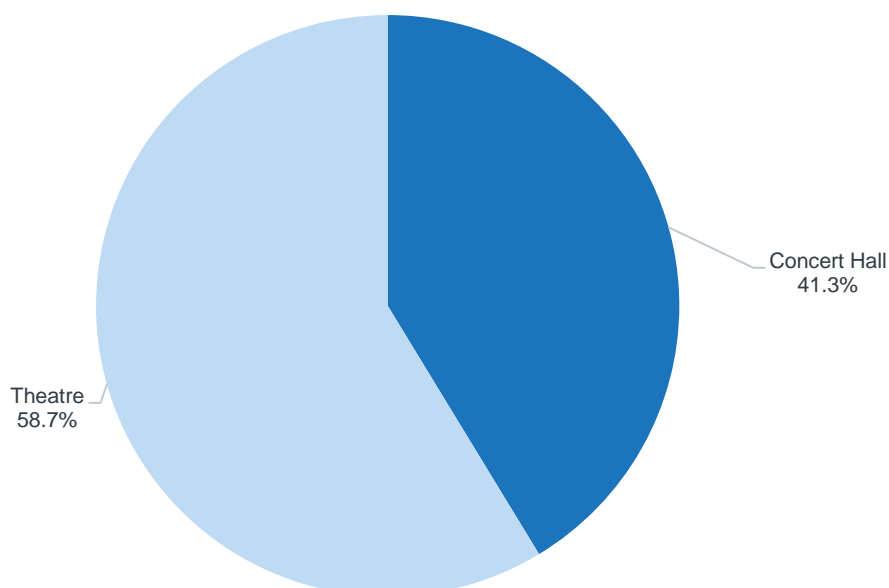
Audience Size	Number of Performances	Proportion of Performances
<b>Theatre-Based Performances</b>		
Less Than 300	0	0.0%
300 to 500	3	14.7%
500 to 700	19	85.3%
700 to 850	0	0.0%
Greater Than 850	0	0.0%
<b>Total</b>	<b>22</b>	<b>100.0%</b>
<b>Concert Hall-Based Performances</b>		
Less Than 300	2	4.8%
300 to 500	19	39.5%
500 to 700	25	51.6%
700 to 850	2	4.1%
Greater Than 850	0	0.0%
<b>Total</b>	<b>49</b>	<b>100.0%</b>
<b>Total Combined</b>	<b>71</b>	<b>100.0%</b>

Source: TCT (unpublished), AFCM (unpublished), AEC (unpublished)

### 2.3.3 Summary of Overall Existing Facility Demand

Overall, there is estimated to be demand for 331 performance days and 428 booking days in Townsville including current events and forgone opportunities. Of these performance days, 194 are best suited to a theatre facility (58.7%) and 137 are best suited to a concert hall (41.3%). This is expected to equate to 176 booking days for a concert hall and 251 booking days for a theatre venue. As such, substantial existing demand has been estimated for both a concert hall and a theatre facility in Townsville.

**Figure 2.6. Preferred Venue Type for Demanded Performances in Townsville, 2022**



Source: TCT (unpublished), AFCM (unpublished), AEC (unpublished)

Note: When a performance type could be held in either a concert hall or a theatre venue it has been allocated to a concert hall.

Audience sizes are expected to vary between theatre-based performances and concert hall-based performances. For performances on the Townsville event calendar (including existing and forgone performances) which are best suited to a theatre venue, there is expected to be sufficient demand for audiences to range from around 75 to 1,000 attendees with an average of around 500 attendees. For performances which are best suited to a concert hall,

there is expected to be demand for an audience of between around 165 and over 1,000 attendees with an average of 500 attendees. There is expected to be sufficient demand for theatre-based performances to attract 110,200 attendances including current and forgone performances while concert-hall performances are expected have demand sufficient demand for 90,800 attendances.

Events of between 500 and 700 attendees are expected to represent the largest proportion (29.6%) of theatre-based performances on the event calendar while events of between 300 and 500 attendees are expected to represent the largest proportion of concert hall-based performances (61.4%). If audience sizes grow in the future additional demand can be met by increasing the size of audiences (where facility seating capacity allows) or increasing the number of performances (where venue availability allows).

**Table 2.5. Estimated Audience Size of Existing and Forgone Performances, 2022, Townsville**

Audience Size	Number of Performances	Proportion of Performances
<b>Theatre-Based Performances</b>		
Less Than 300	48	22.8%
300 to 500	43	20.4%
500 to 700	63	29.6%
700 to 850	43	20.1%
Greater Than 850	15	7.0%
<b>Total</b>	<b>211</b>	<b>100.0%</b>
<b>Concert Hall-Based Performances</b>		
Less Than 300	6	3.5%
300 to 500	112	61.4%
500 to 700	54	29.6%
700 to 850	4	2.2%
Greater Than 850	6	3.3%
<b>Total</b>	<b>183</b>	<b>100.0%</b>
<b>Total Combined</b>	<b>394</b>	<b>100.0%</b>

Source: TCT (unpublished), AFCM (unpublished), AEC (unpublished)

## 2.4 SUMMARY OF PERCEIVED GAPS AND BARRIERS TO GROWTH

There have been numerous studies over the past decade examining the potential need for additional performing arts facilities in Townsville. All of these studies have come to the same conclusion – ***the current supply of performing arts facilities in Townsville is insufficient and inadequate to meet the quantum and range of demand for performing arts space.***

Demand for use of performing arts facilities ranges across professional and amateur production companies, community use, touring companies, schools and local junior arts academies, national and international promoters, and Council's own public performance program (Townsville City Council, 2017b). Demand is also growing strongly as the regional population expands and participation and attendance in the arts increases, particularly at school and young adult age. That there is a gap in supply is not in dispute; nor that this gap is extensive and widening as the Townsville population and interest in the arts grows while supply of appropriate facilities remains relatively constant.

Put simply, as outlined by several previous studies, the current performing arts facilities in Townsville were not designed to cater to a local population of nearly 200,000 people, nor a broader regional population of nearly 400,000 people.

The shortage of appropriate supply is a key factor in the TCT currently being heavily over-subscribed. Both literature review and consultation identified the TCT is commonly booked out at least two years in advance, primarily by community groups whose activities are planned well in advance with a predictable calendar and can secure bookings years into the future. Consultation revealed that community arts organisations are often forced to find alternative sub-optimal venues such as school halls, which rightly or wrongly, is perceived locally to show a lack of support from government for the arts.

As a result of this supply shortage, a number of potential bookings are missed each year, including touring companies and major events, due to a lack of available dates at the Townsville Civic Theatre to meet potential booking times and a lack of suitable alternative venues in Townsville.

As an example:

- There are significant venue availability constraints in Townsville with TCT reaching approximately 83.0% occupancy in 2022 and missed 48 booking days due to lack of availability (not including forgone performances which did not enquire with the venue).
- In 2014/15 Council's three performance spaces were booked for 816 days (74.5% occupancy) with some 110 show bookings turned away, including state and national touring productions (Townsville City Council, 2017b).
- There were only 16 available dates at the TCT in 2014/15 representing a utilisation rate of 94.8% (Townsville City Council, 2017b). This compares to average utilisation rates in 2019 of 73.2% for Queensland and 79.6% for Australia (PAC Australia, 2019).
- Since 2015, and prior to the 2019 flood event, over 110 booking enquiries were turned away due to lack of availability (Townsville City Council, 2019).

Some of these potential bookings are able to find alternative venues to perform at in Townsville (such as the Townsville Entertainment and Convention Centre, Queensland Country Bank Stadium or the Pavilion), but many of these events are unable to find suitable alternative venues.

Due to the lack of supporting facilities, TCT is commonly booked for use by not only large-scale events requiring the 1,000-seat capacity, but also a number of smaller and medium-scale events that could be better catered for by a smaller venue, were a venue of suitable size and quality available in Townsville. With the recent closure of the Riverway Arts Centre and Old Magistrates Court, the number of smaller-scale performing arts spaces available to support the TCT is limited. A fit for purpose small or medium sized theatre could satisfy a significant number of community groups and events.

The TCT is also used across a broad range of performance arts, some of which it is not best suited to. There is no facility in Townsville that is purpose-built for acoustic-based performance. The TCT is designed to accommodate theatre productions and other amplified sound events but does not provide the acoustic quality desired for music that would be provided by an acoustic-based facility such as a concert hall or recital hall. However, due to the lack of acoustic-based venues the TCT is commonly used as a music venue. If a purpose-built acoustics-based facility were available in Townsville, many of the performance bookings at TCT for genres that require acoustic quality, would utilise such a facility and would ultimately alleviate demand pressures at TCT. Definitions of the differences between a concert hall, recital hall and theatre are presented in Appendix B.

It should be acknowledged that while the TCT is 40 years old, it has recently undergone significant refurbishments and improvements which involved repairs to the venue from flood damage and improvements in technology, equipment and capital. Though the TCT is not best suited for acoustic-based performance, the venue is capable of providing theatre users with a high standard of facility and a concert hall would complement the theatre by providing Townsville with a high standard of venue for acoustic-based performances.

Literature review and consultation has identified a lack of suitable venues catering to a full spectrum of performing arts activities, which is a key barrier to growing Townsville's arts and cultural sector. In particular, it has been identified in literature review and consultation that there is a perceived gap in provision of acoustic-based venues, as well as high quality, purpose-built small and/or medium-sized performing arts facilities to support the TCT.

The service need assessment thereby examines the potential market for an acoustic-based performing arts facility (i.e. either a concert hall or recital hall) to meet the perceived gap in this market. The potential need for a flexible and adaptable design to support other uses is also considered, to assist in alleviating existing pressures on the TCT. Given the considerable use of the TCT for small to medium-scale events that could be better catered for by a smaller venue, this report also considers the need for a small, multi-purpose black-box style performance space to supplement the concert hall, which would sit alongside the concert hall and serve as a small theatre for local productions, productions with small audiences and a rehearsal space for concert hall users.

It is noted that TCT remains a high-quality performing arts facility and any new facility should not be designed to compete with the TCT, but rather to complement the TCT offering and facilitate both an improved matching of venue to booking demand and overall growth in performing arts events and activities.

## 3. DRIVERS FOR DEMAND

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### KEY FINDINGS

- As the population grows, so too will the potential audience for live performances. In the 20 years to 2041, Townsville LGA is projected to record average annual population growth of 1.6% to reach a population of approximately 275,700.
- There is estimated to be demand within the Townsville population for approximately 377,800 live event attendances in 2022. This is projected to increase to approximately 505,400 event attendances in 2041 at an average annual growth rate of 1.5%.
- Nationally significant events including the AFCM, the Australian Concerto and Vocal Competition, and performances by state and national acoustic-based performance groups will be significant drivers of the demand for the proposed concert hall.
- Based on indicative findings from consultations, if Townsville had a suitable acoustics-based venue and greater venue availability, state and national acoustic-based performance groups would increase their annual visitation/ performances in Townsville by more than five times their current visitation/ performances on average (noting this is from a relatively small base).

### 3.1 OVERVIEW OF DEMAND DRIVERS

There are a number of factors that drive demand for performance arts facilities within a community, including:

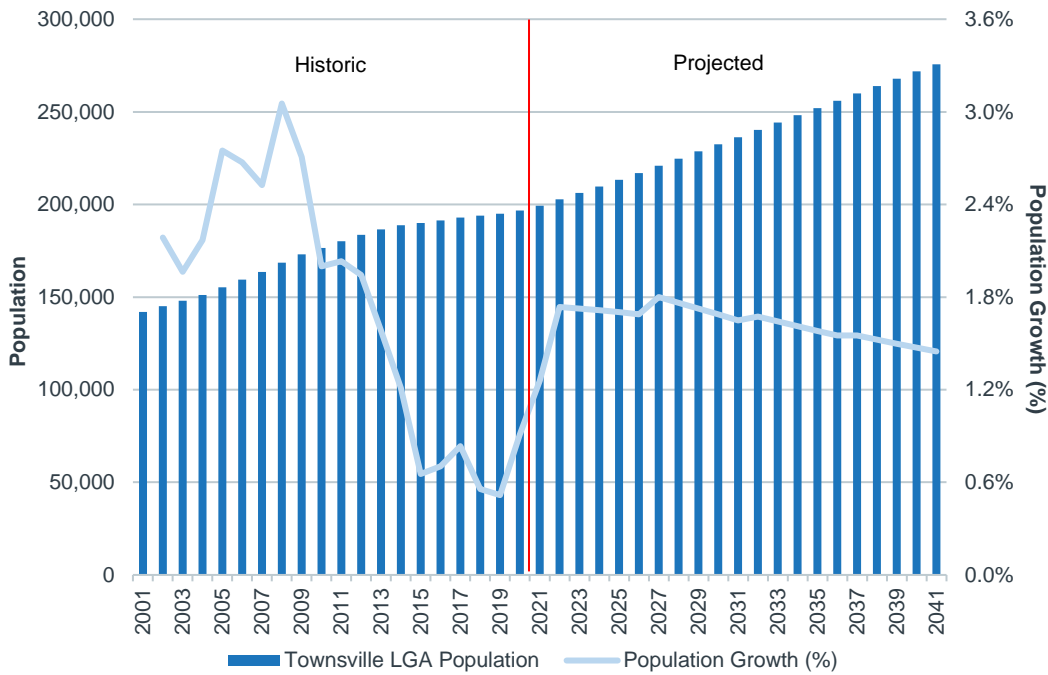
- Demand from the local population to attend and experience performance arts in an appropriate setting.
- Demand from local performance groups for facilities that meet their needs.
- Population size, interest in and capacity to pay to attract major performance arts events and performances.
- Awareness of major performance artists/ groups of the community's interest/ demand, and capacity to schedule performances in the community.

The above factors can be distilled into two key drivers: population growth and attraction of major performance events. These are examined in more detail below. Of these demand drivers, it should be noted that meeting the demands of local population and performance groups will primarily support local amenity, while the attraction of major performances/ events will support both local amenity and attraction of visitors to the region.

### 3.2 POPULATION GROWTH

In the past 20 years, the population of Townsville local government area (LGA) has grown substantially and is projected to continue to grow in the forthcoming 20 years. The population of Townsville LGA has grown from approximately 142,000 people in 2001 to 196,800 in 2020 with an average annual growth rate of 1.7%. In the 20 years to 2041, Townsville LGA is projected to record average annual population growth of 1.6% to reach a population of approximately 275,700.

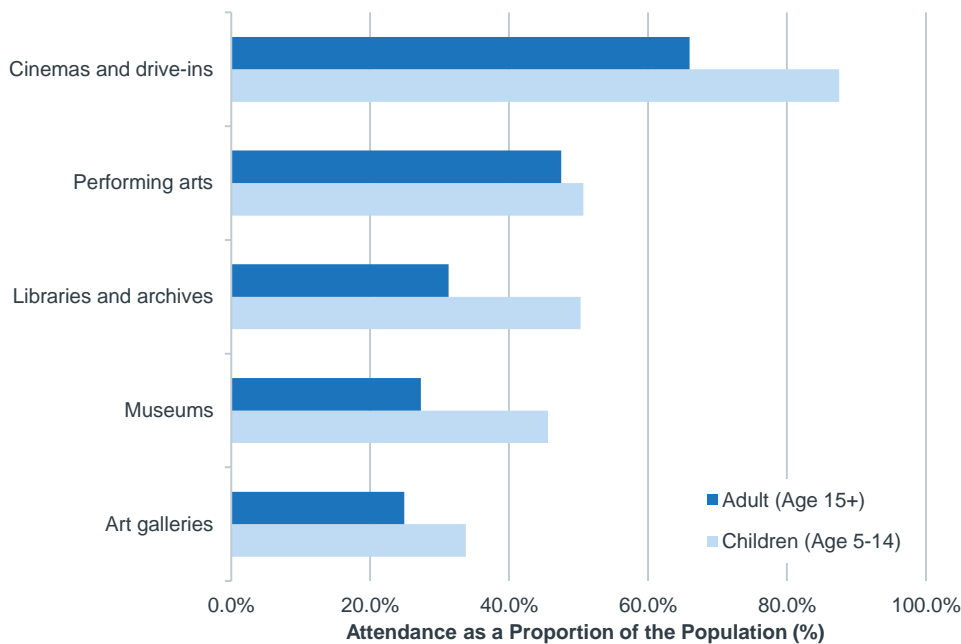
**Figure 3.1. Townsville Historic and Projected Population, 2001 to 2041**



Source: ABS (2021a), QGSO (2022), AEC (2022a)

Arts and cultural events in Australia and in Queensland are well-attended by the population. In the 2017-18 financial year, 82.4% of Australians over the age of 15 years and 94.3% of children aged five to 14 years attended at least one cultural venue or event (ABS, 2019). While strong, attendance in Queensland was modestly lower than the national average with 81.0% of persons over the age of 15 years and 93.0% of children attending at least one cultural event in 2017-18 (ABS, 2019). Performing arts events were the second most popular cultural activity in Queensland with 50.7% of the population between the ages of 5 and 14 years and 47.5% of the population over the age of 15 years attending at least one performing arts event in the 2017-18 financial year.

**Figure 3.2. Attendance at Selected Cultural Events and Venues, Queensland, 2017-18**

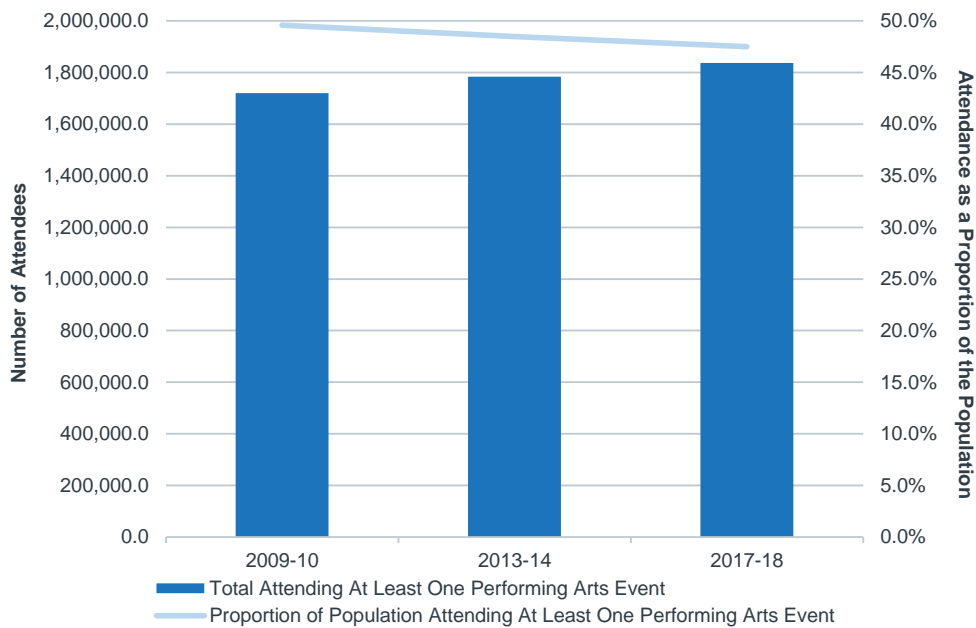


Source: ABS (2019)

Attendance of performing arts events in Queensland has increased in each reporting year since 2019-10 moving from 1.7 million in 2009-10 to 1.8 million in 2017-18, constituting an average annual growth in attendance of 0.8%.

While the number of attendees is higher than the 2009-10 base year, attendance as a proportion of the Queensland population has decreased in each reporting year moving from 49.6% in 2009-10 to 47.5% in 2017-18.

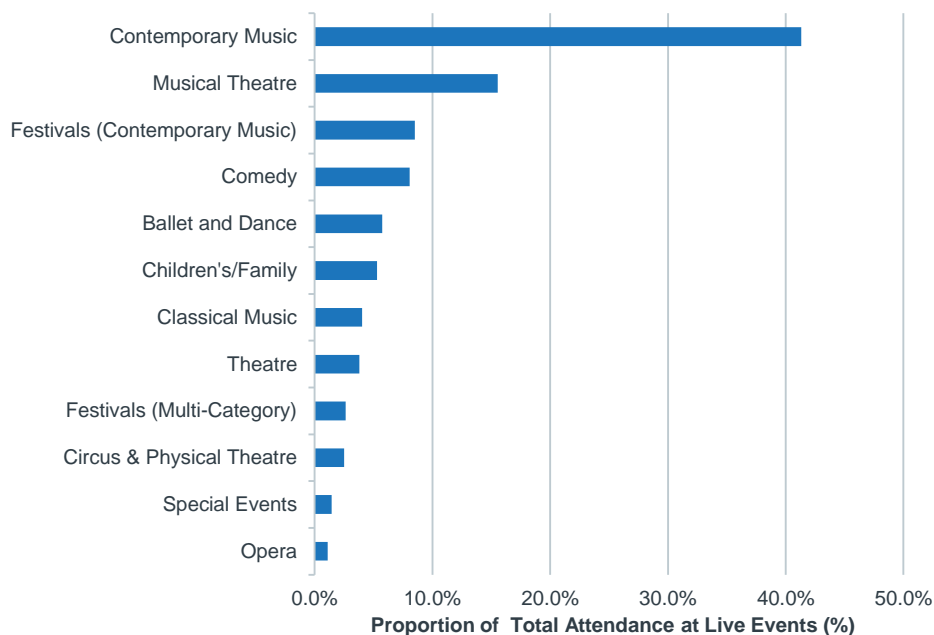
**Figure 3.3. Attendees of Performing Arts Events Aged 15 Years or Over, Queensland, 2017-18**



Source: ABS (2010, 2015, 2019)

Contemporary music events were the most popular live events in Queensland and Australia in 2019. Contemporary music events represented 41.3% of the total live event attendance in Queensland and 34.7% of live event attendance in Australia. Musical theatre followed in both the state and national markets representing 15.5% and 14.5% of live event attendance, respectively. Classical and orchestral music represents a much larger proportion of performance days in Townsville in comparison to Queensland largely due to the impact of the AFCM and the Australian Concerto and Vocal Competition (ACVC). As illustrated in Section 2.3.1, 15.1% of known performances in Townsville are classical or orchestral performances.

**Figure 3.4. Attendance at Live Events, Queensland, 2019**

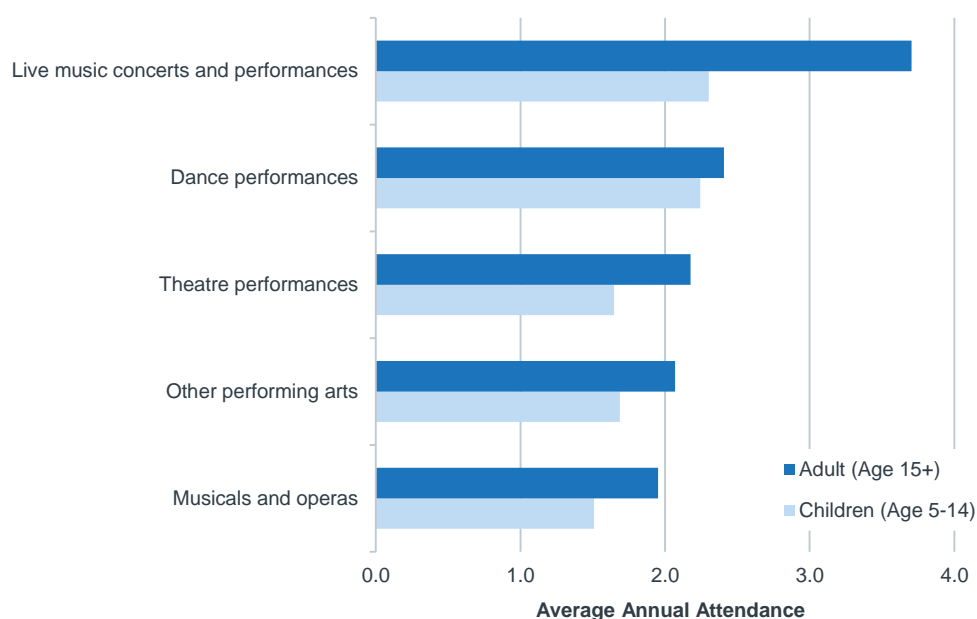


Source: Live Performance Australia (2021)



Most individuals who attended performing arts events in Queensland in the 2017-18 financial year chose to do so multiple times. Among Australians over the age of 15 years, 54.1% of those who attended a performing arts event chose to do so more than once, and 43.0% of attendees between the ages of five and 14 attended more than once in the year. Live music concerts and performances had the highest average attendance among adults and children with adults averaging attendance on 3.7 occasions through the year and children on 2.3 occasions. Dance performances followed with Australians over the age of 15 averaging attendance on 2.4 occasions throughout the year and children between the ages of 5 and 14 averaging attendance on 2.2 occasions.

**Figure 3.5. Frequency of Attendance for People Aged 15 Years and Over, Australia, 2017-18**



Source: ABS (2019)

In the last two years, Queensland has had a lower live performance spend per capita than the national average. In 2019, the live performance industry in Queensland recorded an annual revenue of over \$286 million resulting in a per capita spend of \$55.71, lower than the national per capita spend of \$76.88. Live performance spend per capita fell in 2020 to \$22.50 in Queensland and to \$23.59 in Australia due to COVID-19 and the associated policy responses (Live Performance Australia, 2021).

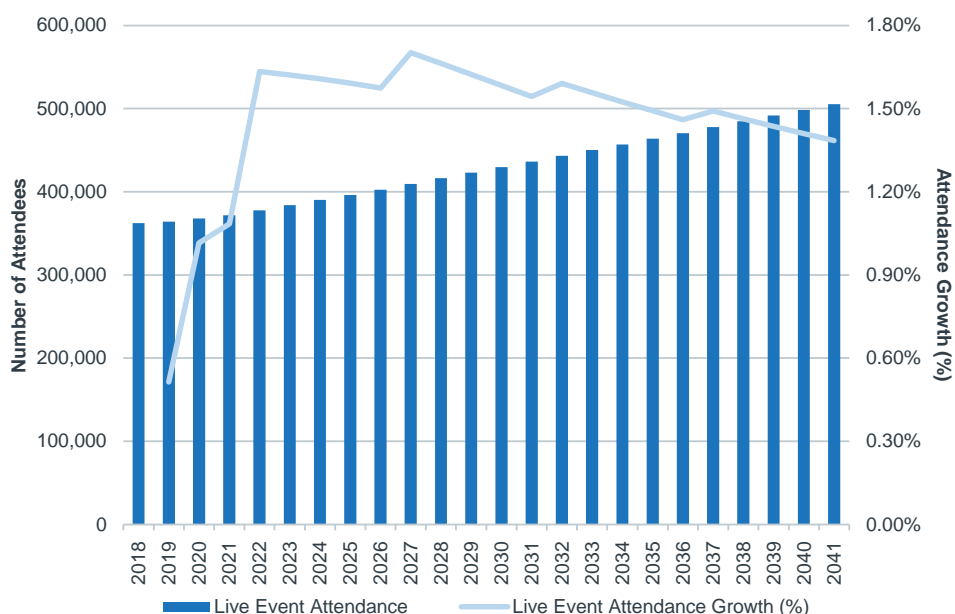
Assuming the population of Townsville has similar event attendance preferences as Queensland more broadly<sup>6</sup>, there is likely to be significant demand for performing arts events. By applying State-wide estimates of the proportion of each age cohort to attend each live event type to the current and projected population of Townsville by the corresponding age cohort and multiplying this by the average number of attendances at each live event type by each age cohort a projection of live event attendances was reached. There is projected to be demand for approximately 377,800 live event attendances by the Townsville population in 2022. This is projected to increase to approximately 505,400 event attendances in 2041 at an average annual growth rate of 1.5%.

<sup>6</sup> Noting Australian attendance rates by age cohort are applied in the first instance (as attendance by age cohort is only available nationally), then rebased to Queensland total attendance rates.

The projection of demand for live performances from the Townsville resident population presented in Figure 3.6 is based on state and national attendance rates applied to the Townsville population. These rates are influenced by capital cities and major events and as such caution should be exercised when interpreting this data as it pertains to attendance of live events by Townsville residents. The projection should be considered an indicative level of demand for live performances by Townsville’s residents, including live performances held in Townsville and outside Townsville.

This projection is not used in determining demand for the concert hall (see section 4) and is presented only for information purposes and as a check that projections of demand for the concert hall presented in section 4, combined with other performance arts facilities in Townsville, are reasonable in consideration of indicative levels of resident demand for live performances.

**Figure 3.6. Projected Demand for Live Performances, Townsville Population, 2018 to 2041**



Note: This is a projection of live event attendances by Townsville residents, this includes events which are held outside Townsville.  
Source: ABS (2019, 2021a), QGSO (2022), AEC (unpublished)

### 3.3 MAJOR/ NATIONALLY SIGNIFICANT PERFORMANCES AND EVENTS

This section includes a review of the major and nationally significant performances and events which will drive demand for a concert hall in Townsville. Current and forgone acoustic performance groups and events are included in this review as such performances are likely to be the key drivers for demand in the proposed concert hall.

#### 3.3.1 Australian Festival of Chamber Music

Usually beginning in the last weekend of July, the AFCM is an annual 10-day festival during which Townsville hosts around 30 unique chamber music concerts each year. Since its premier in 1991, the festival has risen to international significance for its distinguished artists from both Australia and overseas and its innovative programming which covers a range of chamber music styles. It is also reputed as the only major chamber music festival held in the tropics.

The AFCM aims to enrich the cultural life of North Queensland and recognises community engagement as an important part of achieving this. The AFCM runs two music education programs; the Advanced Winterschool Program, a 10-day program for tertiary level on ensembles; and the Winterschool Outreach Program, a series of student workshops and concerts in regional centres. The organisation also conducts various public programs, including free or affordable concerts and performance opportunities for students, and contributes to various community events and programs, including the North Australian Festival of Arts and the JCU Internship Program.

The AFCM is well attended and represents a significant economic opportunity for Townsville. In 2019, the festival attracted approximately 17,400 attendees to free events, 7.6% more than the previous year (noting that the number of free events increased in 2019), and sold a total of 10,375 tickets, 1.2% more than the previous year. In the same year, the festival generated a total spend of \$9.14 million and had a Queensland-wide economic impact of \$3.58 million, 83% of which was recorded in Townsville.

The AFCM attracts significant visitation to Townsville with the festival generating a total of 29,589 visitor nights in 2019 (AFCM, unpublished). Approximately 39.5% of festival attendees reside in Townsville and the remaining 58% are from elsewhere in Australia (mainly from Queensland) and 2.5% were international visitors. The largest proportion of attendees (44%) choose to stay in luxury hotels and serviced apartments, following this, the most popular accommodation among festival attendees is rented houses, apartments or Airbnb (20%) and Standard hotels, motels or motor inns (19.5%) (AFCM, unpublished). The average length of stay by visitors to Townsville for the festival was 9.7 nights with 55% of visitors staying between five and ten nights.

If Townsville were to build a concert hall the AFCM would benefit from increased venue availability and improved performance quality as a result of the venue acoustics. Consultation with the AFCM indicates they anticipate that could add approximately 25-35 additional performances annually as well as an additional four performances outside the festival.

### 3.3.2 Australian Concerto & Vocal Competition

The ACVC is an internationally recognised competition held annually in Townsville over five days in July. The competition was established in 1980 as a piano concerto competition and has since grown significantly, now covering vocal, instrumental and school age sections (ACVC, n.d.). The competition attracts musicians from around the world who perform works from concerto and opera repertoires with professional accompanists. The ACVC has earned prestige as a national event with many of the participants being recognised by the ABC Youth Performers Awards and nationally and internationally recognised adjudicators.

In their goal to create opportunities for musicians, the ACVC award a range of significant cash prizes as well as two significant performance-based prizes (ACVC, n.d.). The John Hopkins Performance Fellowship provides recipients with financial support towards a performance with a community orchestra or ensemble anywhere in Australia or another appropriate activity which will develop the musical career of the winner. The ACVC also provides an opportunity for a musician to perform with the Barrier Reef Orchestra as a soloist in a public concert.

Though the number of performance days staged by the ACVC is dependent on the number of entries they receive and would not be affected by the development of a concert hall, the competition would benefit from increased reliability and acoustic quality of the venue. In 2021, the ACVC was cancelled at short notice due to competing use of Reid Park area by the Supercars utilising the adjacent raceway (Townsville Bulletin, 2021). The cancellation of the event caused considerable reputational damage to both the ACVC and Townsville amongst the arts community. The development of a concert hall in Townsville would not only overcome the risk of competing use of the Reid Park area, but would also improve the quality and status of the competition, as a result of the increased acoustic quality of the venue.

The ACVC is a highly esteemed competition between talented emerging performers from all over Australia. The profile of the competition will be raised by having a venue that is ideally suited to the acoustic nature of the performances. Performers will benefit from their increased ability to showcase their talents with a venue that is designed to enhance the audio quality of their performance and adjudicators will benefit from their ability to judge performers based on the highest quality version of their performances.

### 3.3.3 Major Acoustic-Based Performance Groups

With the addition of a concert hall in Townsville, prominent state and national acoustic-based performance groups are likely to increase their visitation to the region. During stakeholder engagement, many prominent performing arts organisations (as listed in Appendix B) indicated that lack of venue availability or lack of an appropriate venue is a major barrier to performing in Townsville.

Based on indicative findings from consultations, if Townsville had a suitable acoustics-based venue and greater venue availability state and national organisations would increase their visitation to Townsville by 5.6 times the

number current performance days by these organisations (noting this is from a relatively small base). Prominent local organisations would be less likely to add events to their calendar but would benefit from the ability to perform in more appropriate venues as a result of greater availability in existing venues and the addition of the concert hall.

It should be noted that many performing arts organisations are not-for-profit, and their visitation will depend on the funding they receive to enable additional performances and cover touring costs, as well as the relationships they have with future venue operators.

### 3.3.4 Summary of Major/ Nationally Significant Performance and Events Attraction

The AFCM, ACVC and performances by major state and national performance groups will be key drivers of demand for the Townsville Concert Hall. The Concert Hall will provide the required availability and acoustics to enable and incentivise these organisations to increase their visitation to Townsville.

These additional performances will benefit the Townsville community by increasing cultural activity, increasing visitation by performance attendees, and increasing economic activity. The nationally significant events and organisations in particular will benefit Townsville residents as a result of their community engagement work. Local, state and national acoustic performance groups and events are generally primarily government funded and have a requirement to perform community engagement work and, being involved in the arts sector, also have an interest in promoting interest and growth in music in the community. These organisations will often work with schools or community organisations to host workshops, classes and other engagement activities, as such, increased visitation from nationally significant organisations may bring improved cultural development for the community.

## 4. FUTURE DEMAND FOR PERFORMING ARTS

### KEY FINDING

- Townsville is expected to have demand for 364 performance days (471 booking days) in 2041 for performance types that are currently attracted to Townsville (including performances held as well as those foregone due to capacity constraints at existing facilities), an average annual increase of 1.1% on the 297 performance days demanded in 2022.
- Townsville is also estimated to have foregone demand for 34 performance days (44 booking days) as a result of not having an acoustic facility in 2022; this is expected to increase to 45 performance days (58 booking days) by 2041.
- Of the 297 performance days demanded for existing venues in Townsville in 2022, 104 performance days are estimated to be for performances which would be better suited to an acoustic facility. This is expected to increase to 128 performance days in 2041. Including foregone demand for performances which require an acoustic facility, there is estimated to have been sufficient demand for 138 performance days in an acoustic facility in 2022 and 173 performance days in 2041.
- Of the 297 performance days demanded for existing venues in Townsville in 2022, there is estimated to be 195 performance days for performances which are best suited to a theatre venue, which is expected to increase to 236 days in 2041.
- By 2041, performances which attract between 700 and 850 attendees are expected to represent the largest proportion (34.6%) of performances demanded for existing theatre venues.
- By 2041, performances which attract demand for between 500 and 700 attendees are expected to represent the largest proportion (45.4%) of performances demanded for acoustic facilities in Townsville.

### 4.1 GROWTH IN DEMAND FOR PERFORMANCE DAYS IN TOWNSVILLE

As the population grows, so too will the local population's demand for live performances. It can also be expected that as visitation to Townsville grows, so too will demand from visitors for cultural activities such as performing arts. To capture this growth in demand, estimates of the proportion of each age cohort attending different cultural event types were applied to Townsville's current and projected future population disaggregated by the aligning age cohorts. This was then multiplied by the average number of event attendances at current and forgone events by adults and children to reach the projected total number of event attendances disaggregated by event type. This approach assumes rates of use by visitors to Townsville will represent a constant share of total use and will grow at the same rate as the population. Table 4.1 Table 2.1 details the annual average growth rates of projected attendance by event type in Townsville. Live event demand is projected to grow at a decreasing rate as a result of the projected declining growth rate of Townsville's population more broadly.

**Table 4.1. Annual Average Growth in Live Event Demand by Category**

Type of Event	2021-2026	2026-2031	2031-2036	2036-2041
Classical music concerts	1.81%	1.80%	1.65%	1.55%
Popular music concerts	1.54%	1.56%	1.47%	1.40%
Theatre performances	1.69%	1.71%	1.60%	1.50%
Dance performances	1.62%	1.65%	1.53%	1.41%
Musicals and operas	1.65%	1.68%	1.59%	1.49%
Other performing arts	1.53%	1.54%	1.48%	1.38%
Awards	1.61%	1.62%	1.52%	1.44%

Source: ABS (2019, 2021a), QGSO (2022), AEC (unpublished)

With a growing population, the average attendance at performances demanded in Townsville for theatre and acoustic venues is expected to increase over the 20 years from 2022 to 2041. The estimated total audience demand

for each performance category on the 2022 Townsville event calendar (including both current and forgone events) was increased by the annual growth rates listed in Table 4.1 above to reach a projection of audience demand for each performance category. To develop an estimate of current performance days, the projected total audience demand for each performance category was divided by the 2022 average audience size. To project future performance days, the 2022 average audience size was allowed to increase by a proportion of the 2022 average as detailed in Table 4.2. After the audience size limit was reached, it was assumed there was sufficient demand for an additional performance of the same type to be attracted. Based on feedback received during consultations, performances with an audience of fewer than 300 people were assumed to prefer a smaller performance space to preserve the intimacy of the event. Events with audience sizes of greater than 300 in 2022 were assumed to prefer a larger performance space.

**Table 4.2. Assumed Maximum Increase of Current Average Audience Size**

2022 Average Audience Size	Assumed Increase (%)
Less than 149	50%
150-199	20%
200- 249	10%
250-299	5%
300-399	20%
400-499	15%
500-749	10%
750-899	5%
Above 900	3%

Source: AEC

## 4.2 DEMAND FOR THEATRE AND ACOUSTIC PERFORMANCE VENUES

Demand for existing performing arts venues in Townsville is expected to increase steadily in the 20 years from 2022 to 2041. Including both performances which were held in Townsville in 2022 as well as performance opportunities which were missed due to a lack of available capacity at existing facilities, but excluding those potential opportunities missed due to a lack of an acoustic facility, there is estimated to be demand for 297 performance days (384 booking days) in Townsville in 2022. By 2041, this is expected to grow to 364 performance days (471 booking days), representing an average annual increase of 1.1% on the 2022 demand. This will put increasing pressure on the already strained facilities and result in increasing missed opportunities for Townsville. It should be noted that the average number of performances per day in the AFCM and ACVC have been factored into the projections for performance days.

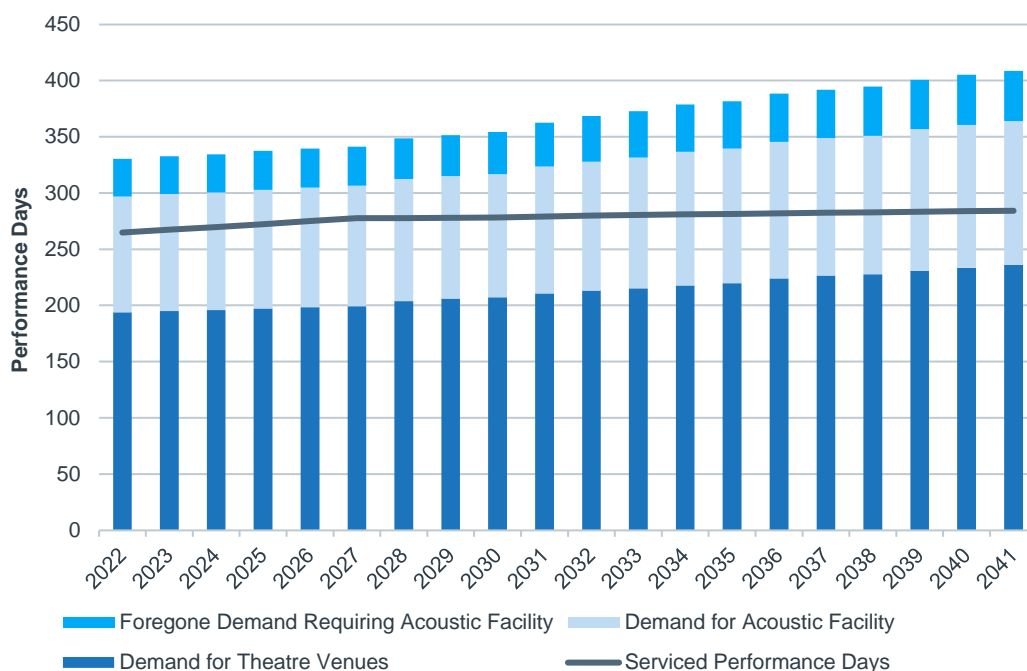
While the majority of the demand for existing performing arts venues in Townsville is best suited to a theatre venue, a substantial portion would prefer to be hosted at an acoustic venue. Of the 297 performance days demanded for existing venues, 103 performance days (34.6%) would be better suited to an acoustic venue in 2022, increasing to 128 performance days (35.2%) by 2041. The remaining 194 performance days in 2022 (65.4%) and 236 performance days in 2041 (64.8%) are best suited to a theatre venue. This demonstrates a significant demand for both a theatre and acoustic venue in Townsville.

Not captured in the demand described above is Townsville's foregone demand from events which require an acoustic venue to perform and would come to Townsville if there was such an appropriate venue. In 2022, Townsville is estimated to have foregone demand for 34 performance days (44 booking days) due to the lack of an appropriate acoustic facility. This is expected to increase by 1.5% per annum to reach 45 performance days (58 booking days) by 2041. With this foregone demand and the demand for existing venues which would be better suited to an acoustic facility, Townsville is expected to have significant demand for an acoustic facility at 137 performance days (176 booking days) in 2022 and 173 performance days (223 booking days) in 2041.

Figure 4.1 illustrates the estimated number of performance days which are able to be serviced by the existing facilities in Townsville. Townsville is estimated to have missed out on 32 performance days demanded for existing facilities as well as the 34 performance days foregone as a result of not having an acoustic venue in 2022. By 2041, with the current supply of performing arts infrastructure, Townsville is expected to miss out on 80 performance days

demanded for existing facilities as well as the 45 performance days foregone as a result of not having an acoustic venue.

**Figure 4.1. Projected Annual Performance Day Demand, Townsville, 2022 to 2041**



Source: ABS (2019, 2021a), QGSO (2022), TCT (unpublished), AFCM (unpublished), AEC (unpublished)

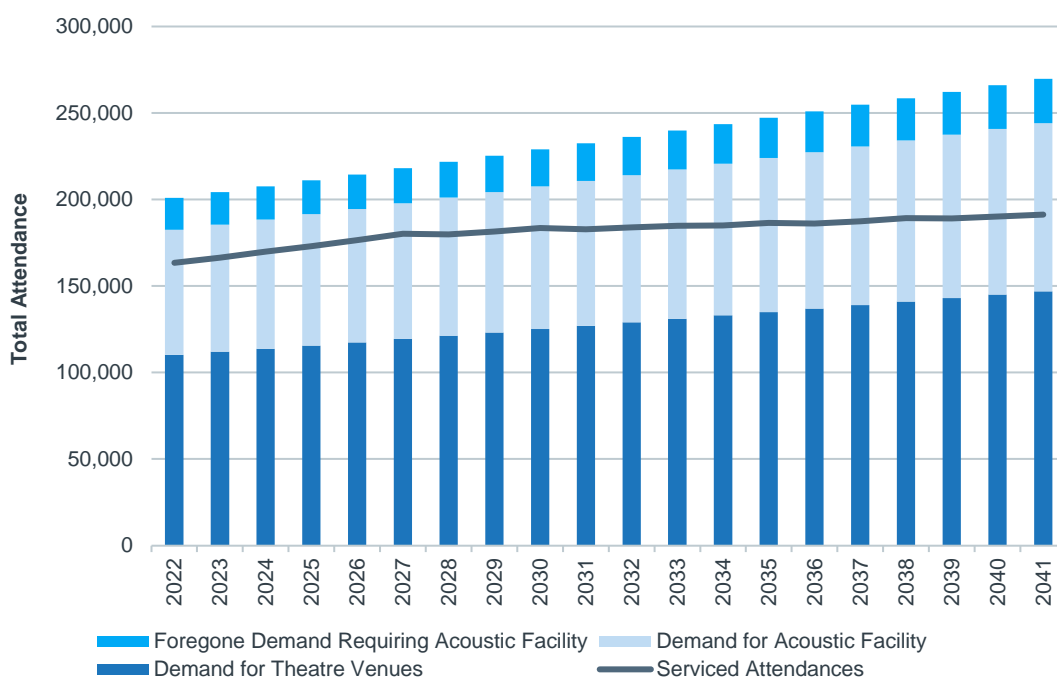
As population and visitation grows, an increasing number of Townsville residents and visitors will look to attend performances. For the 297 performance days demanded at existing venues in Townsville in 2022, there is estimated to be demand for approximately 182,500 attendances. By 2041, this is expected to increase to 244,200 attendances, representing an average increase of 1.5% per annum.

A substantial proportion of the attendances demanded for existing performing arts venues in Townsville are for performances which would be better suited to an acoustic venue, representing 39.6% of attendances demanded in 2022 and 39.8% by 2041. The 182,500 attendances demanded in 2022 includes 72,200 attendances at performances which would be better suited to an acoustic facility. This is expected to increase to around 97,200 attendances at performances which would be better suited to an acoustic venue by 2041. This indicates that a substantial number of performing arts attendees at Townsville venues would benefit from the increased performance quality and performance capacity afforded by an additional acoustic venue. The remaining 110,200 attendances in 2022 and around 147,000 attendances by 2041 are expected to be to theatre-based performances, indicating there will be sufficient demand for high usage of TCT under the scenario in which Townsville has an additional acoustic facility.

Additionally, Townsville is estimated to have foregone demand for 18,500 attendances in 2022 from performances which would be held in Townsville if there was an appropriate acoustic facility but are unable to use existing facilities. By 2041, this is estimated to increase to demand of around 25,500 attendances, representing an average increase of 1.7% per annum from 2022. This indicates a substantial missed opportunity for social and economic benefit to the Townsville region.

Figure 4.2 illustrates the estimated number of attendances which are enabled by the existing facilities in Townsville. Townsville is estimated to have missed out on approximately 19,100 performance attendances demanded at existing facilities in 2022 as well as the 18,500 attendances foregone as a result of not having an acoustic venue. By 2041, with the current supply of performing arts infrastructure, Townsville is expected to miss out on around 53,000 attendances demanded for existing facilities as well as the 25,500 attendances foregone as a result of not having an acoustic venue.

**Figure 4.2. Projected Annual Performance Attendance Demand, Townsville, 2022 to 2041**



Source: ABS (2019, 2021a), QGSO (2022), TCT (unpublished), AFCM (unpublished), AEC (unpublished)

### 4.3 PERFORMANCE SIZES

Assumptions regarding the growth and change in audience sizes over time are outlined in Table 4.2 in section 4.1. Over the 20 year assessment period, performances attracting 500 to 850 attendees are expected to comprise the largest proportion of performances preferring theatre venues at 49.7% in 2022 and 61.0% in 2041. In 2022, the majority of performances preferring an acoustic venue are expected to attract between 300 and 700 attendees at 91.0% of performances. By 2041, the size of performances preferring an acoustic venue are expected to increase. While the majority of performances are still expected to attract audiences of between 300 and 700 attendees (79.8% of performances), the proportion of performances preferring an acoustic venue attracting over 700 attendees is expected to increase to 15.5%.

The performances preferring an acoustic venue which are expected to attract more than 700 attendees are considered to be of significance to Townsville. The AFCM represents all performances attracting more than 850 attendees. Without a venue capable of accommodating the large audiences for the AFCM's major events the performances would have to compromise on quality or reduce the number of tickets available. Performances preferring an acoustic venue which are expected to attract between 700 and 850 attendees are also expected to be of significance to Townsville including major independent acts and state orchestras. Therefore, it is considered to be important to have a facility which will attract such performances and accommodate the large audience.



**Figure 4.3. Estimated Audience Size of Performances Demanded in 2022 and 2041, Townsville**

Audience Size	Number of Performances 2022	Proportion of Performances 2022	Number of Performances 2041	Proportion of Performances 2041
<b>Theatre Venue</b>				
Less than 300	48	22.8%	55	21.3%
300 to 500	43	20.4%	27	10.3%
500 to 700	63	29.6%	68	26.4%
700 to 850	43	20.1%	89	34.6%
Greater than 850	15	7.0%	19	7.3%
<b>Total</b>	<b>211</b>	<b>100.0%</b>	<b>257</b>	<b>100.0%</b>
<b>Acoustic Venue</b>				
Less than 300	6	3.5%	11	4.7%
300 to 500	112	61.4%	79	34.4%
500 to 700	54	29.6%	104	45.4%
700 to 850	4	2.2%	26	11.5%
Greater than 850	6	3.3%	9	3.9%
<b>Total</b>	<b>183</b>	<b>100.0%</b>	<b>229</b>	<b>100.0%</b>
<b>Total Combined</b>	<b>394</b>		<b>486</b>	

Note: This refers to all performances demanded under the scenario in which Townsville has an acoustic facility. Performances were allocated their preferred facility type.

Source: AEC

## 5. SERVICE NEED

### KEY FINDINGS

- Townsville's current cultural infrastructure is limiting the development of the performing arts industry in Townsville. The most significant gap in the city's performing arts facilities was identified to be a venue suitable for large acoustic performances (a concert hall). A small black-box performance space to support additional local or smaller touring productions was identified as a secondary service need.
- There is expected to be significant demand for a concert hall in Townsville. The addition of a concert hall in the region is expected to enhance the cultural landscape in Townsville, increase the quality of acoustic performances and stimulate economic growth in Townsville.
- By 2041, 79.8% of concert hall-based performances in Townsville are expected to attract audience sizes of between 300 and 700 attendees, with 15.5% expected to provide sufficient demand for audiences of more than 700 attendees. The Townsville Concert Hall is recommended to be designed to cater to an audience of 1,000 to ensure its ability to accommodate the small number of culturally significant acoustic-based events with large audiences that the facility is expected to attract. The facility is recommended to not exceed a seating capacity of 1,000 to retain an intimate performance atmosphere for the majority of performances which will be in the 300 to 700 audience range.
- With the addition of a concert hall, TCT will remain a premier theatre performance facility in Townsville with many performance types being best suited to a theatre venue. With demand for acoustic performances accommodated by a new concert hall, the TCT will have the capacity to host more performances which are better suited to a theatre venue and more performances which are unable to be scheduled as far in advance as is necessary.
- Without a new acoustic-based facility in Townsville, there will be no further expansion in either theatre or acoustic-based performing arts, which will also limit the future viability of hosting nationally significant events currently hosted in Townsville.
- As Townsville has already begun missing opportunities for performing arts events and cultural development, the need for additional cultural infrastructure and a solution to the identified service need is immediate.

### 5.1 DESCRIPTION OF IDENTIFIED SERVICE NEED

Based on the preceding research and comprehensive consultation with a number of performing arts companies (both local and touring) and venue operators (both in Townsville and in capital cities), it is clear that Townsville's current cultural infrastructure is limiting the development of the performing arts industry in Townsville.

The primary service need identified was to provide a facility (or facilities) capable of meeting the current and future needs of Townsville's cultural and performing arts sector. The most significant gap in the city's performing arts facilities was identified to be a venue suitable for large acoustic performances (a concert hall). This is particularly needed considering that Townsville is the host city of nationally renowned acoustic performance events.

Based on the findings of the demand assessment, there is expected to be sufficient demand for a stand-alone acoustic-based facility in Townsville, while maintaining high utilisation of the existing TCT.

A small black-box performance space to support additional local or smaller touring productions was identified as a secondary service need. If co-located with the new acoustic facility, it could also be used as a rehearsal/ warm-up space. Consultation indicated that while this space would be considered highly beneficial for and strongly desired by users, it was not required to support the functioning of the main concert hall if it can not be provisioned within the site or for cost reasons, but wherever possible it should be included in the full site design specification so it may be delivered at a later stage.

The new performing arts facility should be located within Townsville's CBD or adjacent precincts to allow the facility to become a community hub and act as a catalyst for economic growth. The facility has the potential to activate the

Townsville city centre and support the Townsville City Deal's aim to deliver a prosperous economic future for the region and to position Townsville as a vibrant, liveable and innovative city.

## 5.2 OPPORTUNITY FOR A TOWNSVILLE CONCERT HALL

There is expected to be significant demand for a concert hall in Townsville. The addition of a concert hall in the region is expected to enhance the cultural landscape, increase the quality of acoustic performances and stimulate economic growth in Townsville.

Based on the venue preferences of existing events and forgone performance opportunities, there is estimated to have been demand for 137 performance days and 176 booking days in a concert hall in 2022. Considering population growth and the increase in average audience sizes described in Section 4.1, demand is anticipated to increase to 173 performance days and 223 booking days by 2041.

By 2041, around 79.8% of concert hall-based performances are expected to attract audience sizes of between 300 and 700, with 15.5% expected to provide sufficient demand for audiences of more than 700 attendees. As such, the Townsville Concert Hall is recommended to be designed to cater to an audience of up to around 1,000 patrons to ensure its ability to accommodate the culturally significant acoustic-based events with large audiences that the facility is expected to attract. The facility is recommended to not exceed a seating capacity of 1,000 to retain an intimate performance atmosphere for the majority of performances which will be in the 300 to 700 audience range.

There is estimated to be demand for 72,200 attendances at performances demanded at existing venues in Townsville in 2022 which would be better suited to a concert hall, including forgone performances this is estimated to increase to around 90,800 attendances. By 2041, the Concert Hall is expected to support around 122,700 attendances each year.

The Concert Hall also requires ancillary features including front and back of house facilities. These were considered and outlined in detail in the Blight Rayner's Design Documentation.

## 5.3 OPPORTUNITY FOR THE TOWNSVILLE CIVIC THEATRE

With the addition of a concert hall, TCT will remain a premier theatre performance facility in Townsville with many performance types being best suited to a theatre venue. With demand for acoustic performances accommodated by a new concert hall, the TCT will have the capacity to host more performances which are better suited to a theatre venue and more performances which are unable to be scheduled as far in advance as is necessary.

Based on current usage and performance opportunities missed for reasons outside lack of an acoustic facility (e.g., capacity constraints at existing facilities), with the addition of a concert hall there is estimated to have been sufficient demand for 194 performance days and 251 booking days at TCT in 2022 including current performances and missed opportunities. Considering population growth and the increase in average audience sizes described in Section 4.1, demand is anticipated to increase to 236 performance days and 305 booking days by 2041.

The total number of attendances at performances demanded at existing venues in Townsville in 2022 which are best suited to a theatre venue is estimated to be 110,200. By 2041, the TCT is expected to support 147,000 attendances each year.

## 5.4 IMPLICATIONS OF NOT PROCEEDING

The implications of not proceeding with a solution to the identified service need of meeting current needs and future growth in both theatre and acoustic performances in Townsville will be that the capacity and suitability of existing performance spaces will be both insufficient and inadequate to realise the growth potential of the arts industry in Townsville. As Townsville has already begun missing opportunities for performing arts events and cultural development, the need for additional cultural infrastructure and a solution to the identified service need is immediate.

Without a new acoustic-based facility in Townsville, there will be no further expansion in either theatre or acoustic-based performing arts, which will also limit the future viability of hosting nationally significant events in Townsville. Further, cultural and creative sectors are suggested to promote significant socio-economic growth. In addition to

being a source of jobs and income, cultural and creative sectors drive innovation, develop and attract creative skills and drive growth in other sectors such as cultural tourism (OECD, 2021). Cultural and creative sectors are also suggested to have significant social impacts including promoting health and well-being, social inclusion and local social capital (OECD, 2021). The benefits Townsville is able to generate from cultural and creative sectors are limited with the existing level of cultural capital, without an additional acoustic-based facility and expansion in theatre or acoustic-based performing arts, Townsville will not realise the extent of benefits available from cultural and creative sectors.

By not proceeding with a solution to the identified service need, Townsville will forego a significant opportunity to increase activity in the local economy. In addition to the direct local expenditure by the performing arts centre, audience members are likely to increase spending as a result of their attendance at a performance. Every performance that the Concert Hall can deliver that would otherwise not have occurred will have a substantial impact on the Townsville economy. By neglecting to proceed with a new acoustic-based facility, this opportunity for local economic growth will be missed. Not proceeding with a solution to the identified service need will also adversely impact on progression and delivery of Commitment Two of the Townsville City Deal. Commitment Two involves the delivery of a new entertainment and convention centre, though, as noted previously, this commitment has pivoted to the establishment of a concert hall and, potentially, broader cultural and entertainment precinct.

Though the TCT has undergone significant refurbishments and upgrades in the last five years and remains a high-quality performance arts theatre, a 40-year-old venue of this size and scale will likely have ongoing and increasing maintenance and upgrade costs in the future. The high demand for its facilities adds further stress on the building infrastructure and is likely to accelerate the scale and urgency of these updates. An additional performance venue (such as the proposed concert hall) is likely to provide additional capacity to extend the life of the TCT, provide an alternative venue during the substantial downtime required to upgrade the TCT and ensures professional cultural infrastructure is delivered for the Townsville community with greater sustainability.

## 6. BENEFITS OF THE PROJECT

The identified anticipated benefits of addressing Townsville's need for a concert hall are described and summarised in the table below. For each benefit, the potential beneficiaries and the overarching outcome to be achieved are identified.

**Table 6.1. Anticipated Benefits from Addressing the Service Need**

Benefit Related Outcome	Benefit Description	Potential Beneficiary	Benefit Type	Unit of Measurement	Relative Importance
Number of Performances	Increase in number of visual art performances (acoustic and theatre) in Townsville	Local community / audiences / arts industry	Quantitative	Number of performances	High
Quality of Performances	Increase in quality of performing arts shows (acoustic and theatre) in Townsville	Local community / audiences / arts industry	Quantitative	Audience size	High
Audience Amenity	Increase in quality, variety and availability of performing arts shows in Townsville	Audiences	Qualitative	Audience experience	Medium
Development of the Arts	Build demand over time for opportunities to further development of the arts in Townsville, such as the establishment of a regional conservatorium	Local community / audiences	Quantitative	Establishment of regional conservatorium	Low
Development of local First Nations Performing Artists	Support the development and exposure of local First Nations performing artists and groups by providing access to performing arts facilities.	Local First Nations performing artists / audiences	Qualitative	Number of performances by local First Nations Artists	High
Tourist Visitation	Increase in cultural tourism visitation to Townsville City	Local businesses	Quantitative	Visitor nights (non-business)	Medium
Employment	Increase in employment opportunities in Townsville (both direct arts and indirect business activity)	Local community	Quantitative	FTEs (arts sector and total FTE)	High
Business Activity	Increase in existing business activity and creation of new business opportunities in Townsville	Local community / businesses	Quantitative	Number of employing businesses	High
Taxation Revenue	Increased taxation revenue to all levels of government from increased economic activity	Government	Quantitative	(\$) tax revenue	Medium
Social Benefits	Promotion of growth in cultural sector leading to improved health and well-being, social inclusion and local social capital.	Local community	Qualitative	Community experience and quality of life	Medium

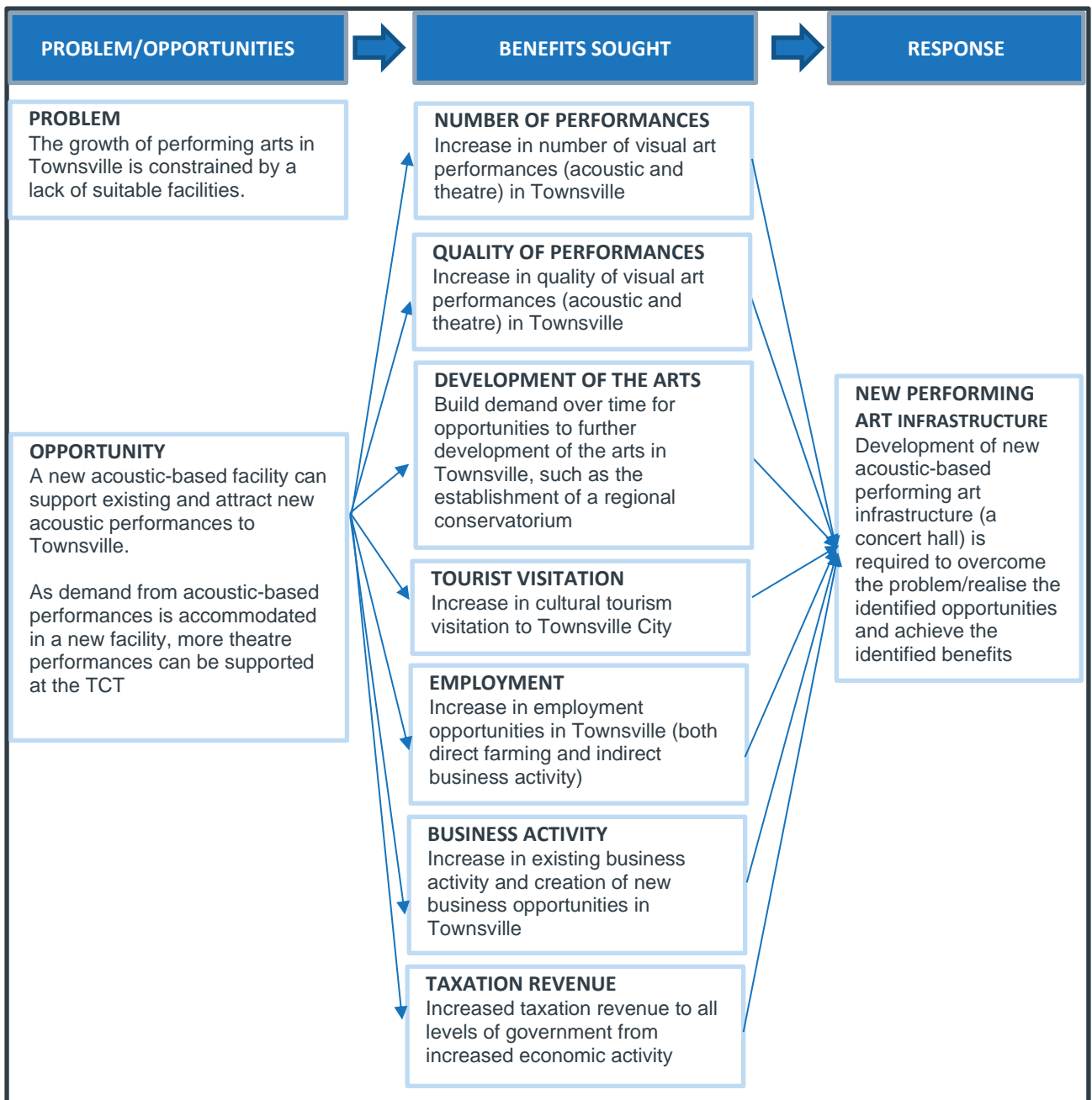
Source: AEC

## 7. INVESTMENT LOGIC MAP

The Investment Logic Map (ILM) identifies the response needed to address the service need while achieving the range of benefits sought.

The figure below articulates the service needs through the framework of a partial ILM exercise, outlining the problems and opportunities, targeted benefits and strategic response required.

Figure 7.1. Partial Investment Logic Map



Source: AEC

## 8. STAKEHOLDERS

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This section provides a summary of the stakeholder engagement responsibilities and the identification of key stakeholders and their likely position on the proposal. Though consultation continued during later stages of the DBC, this section refers specifically to the consultation which occurred for the purpose of the service need report. For the detailed stakeholder engagement plan, refer to *Stakeholder Engagement Plan: Townsville Concert Hall Detailed Business Case* (AEC, 2022b).

Prior to engaging with key stakeholders a detailed literature review was conducted examining the alignment of the project with Australian, state and local government strategic planning policies and plans. An overview of this research is included in Appendix C.

### 8.1 STAKEHOLDER ENGAGEMENT APPROACH

Stakeholder and community engagement was undertaken specifically to inform the service need of the project for the DBC. Engagement was undertaken in two phases, in April and June 2022 (stakeholder consultation was paused during the caretaker period for the federal election).

The aim of stakeholder engagement was to:

- Understand local key stakeholder perspectives on challenges and opportunities for delivering arts and cultural services to Townsville (including infrastructure and policy/non-infrastructure barriers)
- Verify the accuracy of analysis inputs (such as current event profile and facility utilization, growth opportunities and aspirational facilities, and specific facility specifications)
- Verify analysis outcomes at various stages (where appropriate)
- Ensure key local stakeholders have confidence in the DBC and its recommendations, which may de-risk any future decision to invest in new opportunities for the region

The types of information sought during stakeholder engagement included:

- Current events (frequency, patrons, ticket pricing, event costs)
- Adequacy of existing regional facilities
- Current market for arts in Townsville
- Potential future market for arts in Townsville
- Current and potential market reach of new facilities within the region (visitation from areas outside of Townsville City)
- Operational limitations of existing facilities (if any)
- Events/activities currently missed/unable to be serviced with current facilities, and will future facilities meet these service needs
- Gaps in current offering that could be serviced with new facilities
- Types of features required in future facilities (design parameters), including parking and public transport accessibility
- Aspirational facilities (in other regions)
- Current and future non-infrastructure needs
- Socio-cultural considerations in the development of arts in Townsville

## 8.2 STAKEHOLDERS ENGAGED

Engagement involved a number of one-on-one and group discussions with a range of arts stakeholders requiring an acoustic-based facility and other interested arts stakeholders, as well as civic leaders and other interested members of the community. A full list of stakeholders has been included in the table below.

**Table 8.1. Stakeholders Engaged and Project Interest**

Name	Organisation
<b>Arts Stakeholders</b>	
<Name Redacted>	Australian Brandenburg Orchestra
<Name Redacted>	Australian Chamber Orchestra
<Name Redacted>	Australian Concert and Vocal Competition (ACVC)
<Name Redacted>	Australian Festival of Chamber Music
<Name Redacted>	Australian Festival of Chamber Music
<Name Redacted>	Australian Festival of Chamber Music
<Name Redacted>	Australian Romantic & Classical Orchestra
<Name Redacted>	Australian String Quartet
<Name Redacted>	Barrier Reef Orchestra
<Name Redacted>	Big Eye Theatre
<Name Redacted>	Camerata - Queensland Chamber Orchestra
<Name Redacted>	Circa
<Name Redacted>	City Recital Hall Angel Place
<Name Redacted>	Dancenorth
<Name Redacted>	Friends of the Theatre Townsville
<Name Redacted>	Full Throttle Theatre Company
<Name Redacted>	Local Councillor Division 3 Chair Arts & Culture Advisory Committee
<Name Redacted>	Local Councillor Division 9 ACVC Board Member
<Name Redacted>	Melbourne Cultural Precinct
<Name Redacted>	Musica Viva
<Name Redacted>	North Australia Festival of the Arts Townsville City Council
<Name Redacted>	NQOMT, Barrier Reef Orchestra, ACVC, AFCM, Tville Little Theatre
<Name Redacted>	Nth Qld Opera & Music Theatre
<Name Redacted>	Opera Queensland
<Name Redacted>	Opera Queensland
<Name Redacted>	Pimlico State Highschool
<Name Redacted>	Professional Arts North Queensland (PANQ)
<Name Redacted>	Professional Arts North Queensland (PANQ)
<Name Redacted>	QMusic
<Name Redacted>	Queensland Ballet
<Name Redacted>	Queensland Ballet
<Name Redacted>	Queensland Music Festival Pty Ltd
<Name Redacted>	Queensland Performing Arts Centre (QPAC)
<Name Redacted>	Queensland Symphony Orchestra
<Name Redacted>	Queensland Symphony Orchestra
<Name Redacted>	Queensland Symphony Orchestra
<Name Redacted>	Queensland Symphony Orchestra
<Name Redacted>	Queensland Theatre Company
<Name Redacted>	Queensland Youth Orchestra



Name	Organisation
<Name Redacted>	Stage Queensland
<Name Redacted>	TheatreINQ
<Name Redacted>	Townsville Chamber of Commerce
<Name Redacted>	Townsville Choral Society
<Name Redacted>	Townsville Choral Society (Immediate Past President)
<Name Redacted>	Townsville Civic Theatre
<Name Redacted>	Townsville Community Music Centre
<Name Redacted>	Townsville Eisteddfod
<Name Redacted>	Townsville Little Theatre
<Name Redacted>	Townsville Performing Arts Centre
<Name Redacted>	Townsville Theatre Community
<Name Redacted>	Ukaria
<Name Redacted>	Ukaria & Musica Viva
<Name Redacted>	Wulgurukaba Walkabouts
<b>Non-Arts Stakeholders</b>	
<Name Redacted>	Townsville Enterprise
<Name Redacted>	Urban Development Institute of Australia
<Name Redacted>	Townsville City Council - Mayor
<Name Redacted>	Townsville City Council - CEO
<Name Redacted>	Gleeson Group
<Name Redacted>	Althea Projects

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## APPENDIX A: PERFORMING ARTS FACILITY TYPES

In understanding the service need for a concert hall or a theatre, it is necessary to first understand the key differences between these facilities.

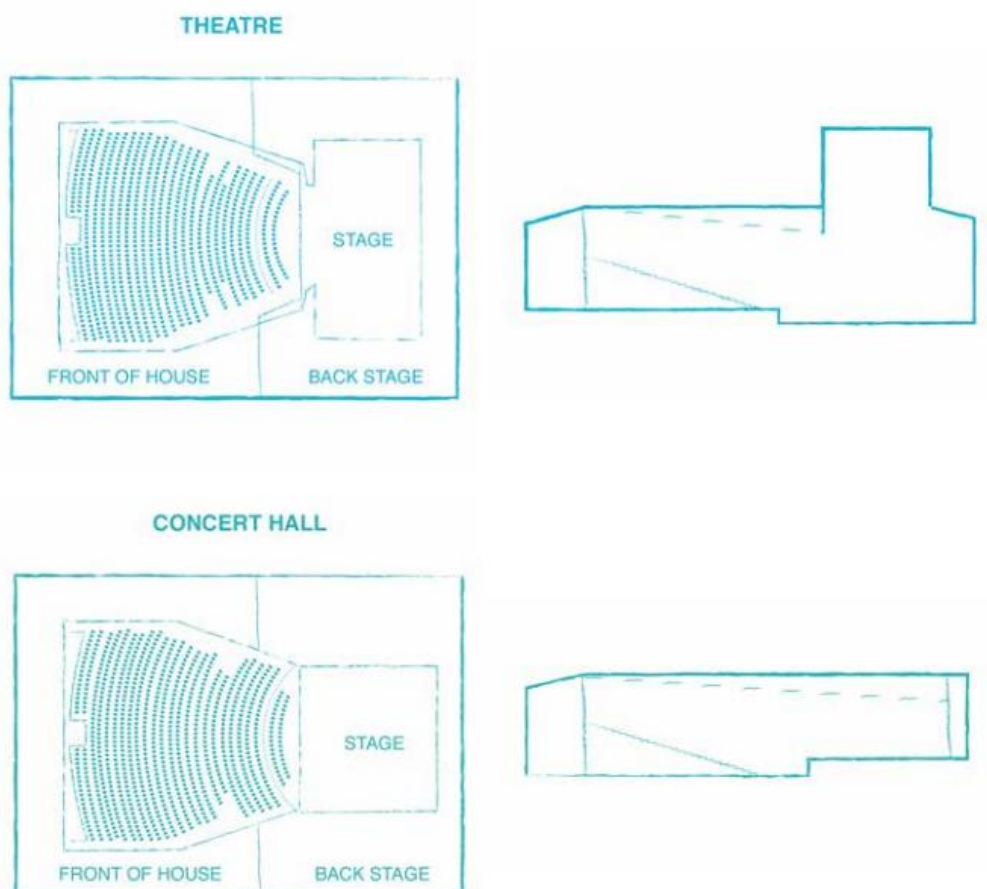
### CONCERT HALL VS THEATRE

A concert hall is structurally different to a proscenium arch style theatre (such as the existing Townsville Civic Theatre, or the Capitol Sydney and Empire Toowoomba).

In a classic proscenium arch style theatre the auditorium is effectively a separate space from the stage, divided by the arch and usually an orchestra pit. Above the stage a fly tower (often 7 to 10 storeys high) and a fly system of bars, weights and pulleys is used to “fly” sets, screens, tabs, curtains, cyclorama and extensive stage lighting. There are also typically small “wings” to each side of the stage. This void above and to the sides of the performance area has considerable adverse impacts on the acoustic quality of sound emanating from the stage (i.e., voice, instruments, projected sound). In general, a theatre is designed to suit amplified sound.

In a concert hall, the performance area (stage) is in the same room as the audience without a proscenium arch, fly tower or wings – acoustically the sound does not “escape” into the above-mentioned void, making a concert hall a preferable choice for acoustic-based music performances. Choice of flooring is also important for a concert hall, with no carpet or curtains preferable to avoid sound dampening. A depiction of the differences is provided Figure A. 1 below.

**Figure A. 1. Depiction of Differences Between a Theatre and Concert Hall**



Source: Townsville City Council (2017b)

Whilst the Townsville Civic Theatre is suitable for musical theatre (with large chorus productions, orchestra, set changes and scenery) and for amplified performance (popular and rock music, comedians, etc), it is not designed

to give perfect acoustic performance of classical and orchestral performances from soloists to philharmonic size orchestra concerts such as is delivered by a concert hall.

## CONCERT HALL VS RECITAL HALL

While there are considerable stylistic differences between a concert hall and a theatre, the differences between a concert hall and recital hall are more subtle. Both have requirements to support acoustic (non-amplified) performances. In both cases there is no fly tower above the stage, no stage wings or proscenium arch – these are features of a theatre which has acoustics to suit amplified sound.

In simple terms, the main difference between a concert hall and recital hall is that of size. A recital hall is designed to support individual (solo) or small ensemble acoustic performances, while a concert hall is primarily designed for symphonic music, requiring a large stage that can accommodate large numbers of musicians at once.

## APPENDIX B: DEMAND ASSESSMENT TOOLS

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To understand and estimate the current and projected future demand for a concert hall in Townsville, AEC undertook a multi-stage process examining information from a range of sources to estimate the number of performances local, state and national organisations would bring to Townsville if a concert hall were to be developed and how this may change as population grows into the future.

In undertaking the demand assessment AEC used information from the following sources:

- Desktop literature review and data collation
- Review of information provided by local stakeholders
- Consultation with local, state and national stakeholders and organisations.

These are examined in more detail below.

### Desktop Research

Data gathering and research from publicly available sources played a key role in the development of the demand assessment. Specifically, a profile of demand for cultural events was developed based on:

- ABS data regarding national and state participation in and attendance at cultural activities (ABS, 2019).
- National live event industry data published by Live Performance Australia (2021).

Summary results are presented in section 3.1. State/ national data was converted to an estimate of local demand in Townsville LGA based on per capita participation/ attendance rates applied to Townsville LGA population (ABS, 2019). Projections of demand in Townsville LGA were then developed based on population projections by age cohort from the Queensland Government Statistician's Office (QGSO, 2022) and the Australian Bureau of Statistics (ABS, 2021a, 2022).

In addition to the above data, documents outlined in Appendix A as part of the Literature Review were used to supplement and inform the demand assessment.

### Information Provided by Local Stakeholders

#### **Townsville Civic Theatre**

Representatives of the TCT provided AEC with unpublished information to assist with the development of the demand assessment. As the premier performing arts facility in the Townsville region, understanding the current demand for the TCT was key to understanding the demand for the proposed concert hall. The information provided by Townsville Civic Theatre included:

- The current booking schedule of the theatre (2022 calendar)
- A list of regular annual bookings
- Missed bookings over the past year due to lack of availability
- Insight into the anticipated venue preferences of each performance genre (e.g. comedy, opera, cabaret, etc)
- Information regarding ticket pricing and anticipated audience size.

#### **Australian Festival of Chamber Music**

The AFCM provided extensive information in contribution to the development of the demand assessment. As a prominent annual user of event spaces in Townsville, information provided by the AFCM was key in understanding current and future demand for event spaces in the region. In addition to participating in consultations (as detailed below), information provided by AFCM included:

- The current (2022) event schedule

- The venue of each performance
- Actual and target box office sales for each performance
- Various internal research reports which provided additional information on the AFCM, its audience and its outlook.

### Stakeholder Engagement

Consultations were undertaken to understand the potential future demand for venues spaces in Townsville. AEC engaged key local, state and national organisations which were determined to be potentially able to increase performances in Townsville under the scenario in which Townsville has a concert hall. The specific engagement objectives were to understand:

- The venue requirements of different organisations
- What barriers have prevented the organisation from performing (or performing more often) in Townsville
- The propensity of each organisation to increase performances in Townsville under the scenario in which Townsville has a concert hall that meets their requirements
- The external factors, beyond the facility itself, that would be required for each organisation to perform in Townsville
- The current, or most common, venue hire structure used by the organisation
- The ticket pricing structure for regional audiences
- Each organisation's revenue generation model
- The expected hire fee for a venue (such as a concert hall) in Townsville
- Anticipated audience size and composition of local or visiting attendees.

The consultations involved 12 organisations, including five local, four state and three national organisations. The final list of participating organisations is provided below.

**Table B. 1. Demand Assessment Consultation List**

Organisation	Organisation Type	Date Consulted
<b>Local Organisations</b>		
Australian Festival of Chamber Music	Festival	June 3, 2022
Barrier Reef Orchestra	Orchestra	June 7, 2022
Dancenorth	Dance Company	June 9, 2022
Townsville Choral Society	Local Music Company	June 10, 2022
Townsville Eisteddfod	Festival	June 10, 2022
Australian Concerto and Vocal Competition	Festival	July 15, 2022
<b>State Organisations</b>		
Queensland Youth Orchestra	Orchestra	June 3, 2022
Queensland Symphony Orchestra	Orchestra	June 7, 2022
Opera Queensland	Opera	June 17, 2022
Queensland Ballet	Dance Company	June 17, 2022
<b>National Organisations</b>		
Australian Romantic and Classical Orchestra	Orchestra	June 10, 2022
Australian String Quartet	Classical Music Company	June 22, 2022
Australian Brandenburg Orchestra	Orchestra	June 23, 2022


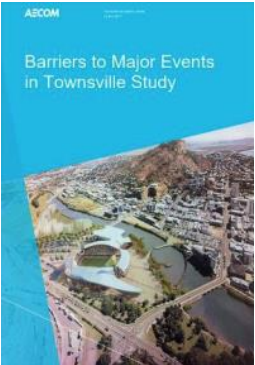

Industry experts were also consulted to identify the preferred facility type of different genres of performance. Performances genres could be allocated to a concert hall, flexible acoustic facility (acoustic and amplified sound), or a theatre.



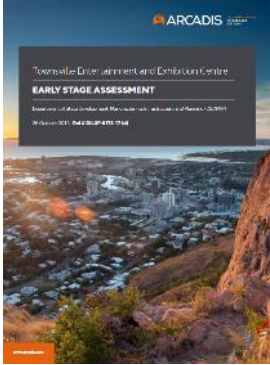
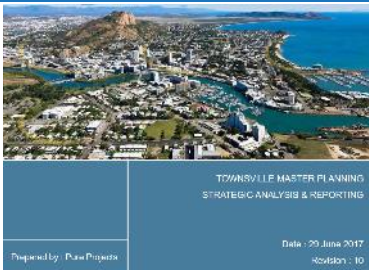
# APPENDIX C: LITERATURE REVIEW STRATEGIC ALIGNMENT


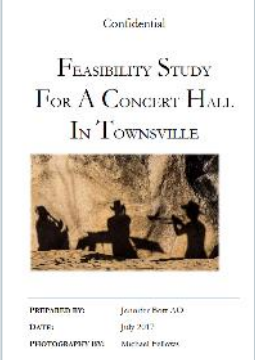

## SUMMARY OF KEY DOCUMENTS

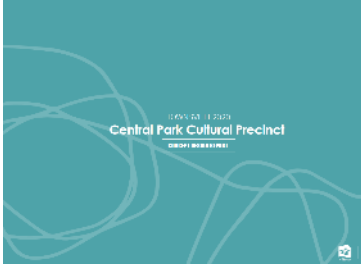
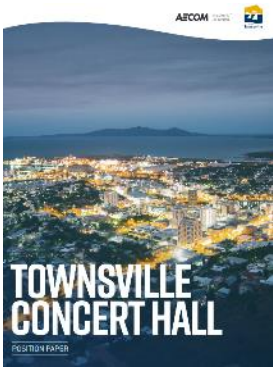
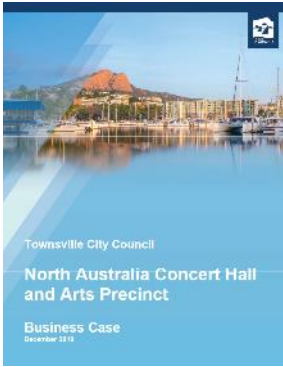
Key points following the review is contained in the table below, with additional information and context contained in the following section “Detailed Review of Key Documents”

Report / Paper	Overview & Key Findings
	<p><b>A Cultural Plan for Townsville (Positive Solutions, 1999)</b></p> <p>Townsville City Council engaged Positive Solutions (1999) to produce a Cultural Planning Document for the city of Townsville in collaboration with the Council’s Community and Cultural Development Department.</p> <p>The report found:</p> <ul style="list-style-type: none"> <li>• Sufficient demand for a new performing arts space, smaller than the current Townsville Civic Theatre</li> <li>• The proposed facility would be between 800m<sup>2</sup> and 1,200m<sup>2</sup></li> <li>• The proposed facility would cost between \$2 million and \$3.6 million to construct</li> <li>• A subsidy of between \$125,000 and \$150,000 is likely to be required to operate the establishment.</li> </ul>
	<p><b>Barriers to Major Events in Townsville Study (AECOM, 2016)</b></p> <p>Townsville Enterprise Limited (TEL) appointed ACEOM (2016) to undertake an assessment of the barriers to major events in Townsville.</p> <p>Through desktop research and stakeholder engagement, the report identified the following key barriers to major events in Townsville:</p> <ul style="list-style-type: none"> <li>• Weather</li> <li>• Event profitability</li> <li>• Event logistics</li> <li>• Existing venue options</li> <li>• Lack of support</li> </ul>
	<p><b>Townsville Entertainment and Convention Centre (Cox Rayner, 2010)</b></p> <p>Council commissioned Cox Rayner (2010) to perform a preliminary comparative site analysis of six potential locations for a new Townsville Entertainment and Convention Centre (TECC). The report considered a new TECC which would meet the requirements of a 5,200-seat arena, a 3,000m<sup>2</sup> exhibition space, a ballroom or banquet capacity of 1,800 people and 12 meeting rooms.</p> <p>The report recommended for the ‘Dean Street’ location to be progressed in future planning for a new TECC due to:</p> <ul style="list-style-type: none"> <li>• Its close proximity to the CBD and hotel and restaurant amenities,</li> <li>• Its accessibility via public and private transport,</li> </ul>

Report / Paper	Overview & Key Findings
	<ul style="list-style-type: none"> <li>• Its capacity to accommodate the current needs of the TECC as well as potential future development,</li> <li>• The potential of the site to accommodate a high visibility, iconic building.</li> </ul>
	<p><b>Townsville Entertainment and Convention Centre Redevelopment Plan (Grimer &amp; Co, 2010)</b></p> <p>Gary Grimmer &amp; Company (2010) was commissioned by the TECC to assess the need to refurbish or expand the existing venue and provide recommendations for its future development.</p> <p>The report recommended:</p> <ul style="list-style-type: none"> <li>• The demolition of the existing TECC to construct a new multi-purpose facility on Dean Street</li> <li>• The new venue to be 22,663m<sup>2</sup>, including a 5,200-seat arena and 12 meeting rooms</li> <li>• The new venue to accommodate business, sporting and entertainment events in a more central location</li> <li>• The new venue was expected to generate an average economic benefit of \$96.5 million per year over 20 years.</li> </ul>
	<p><b>Feasibility Study for a New Sport, Entertainment and Convention Facility in Townsville (KPMG, 2013)</b></p> <p>KPMG (2013) was engaged by Townsville City Council to develop a feasibility study and concept design for new or redeveloped sporting, entertainment and convention centre facilities in light of Townsville's two primary sporting and entertainment venues, TECC and Willow Sports Complex, nearing the end of their economic useful lives.</p> <p>The report recommended:</p> <ul style="list-style-type: none"> <li>• The demolition of the Willow Sport Complex and the TECC</li> <li>• The development of an integrated stadium (30,000 capacity) and flexible entertainment centre (6,000 capacity).</li> <li>• The development to be located on the Dean Street site at an estimated cost of \$316.0</li> <li>• Full public financing.</li> </ul>
	<p><b>North Queensland Arts and Cultural Centre: Scoping Report (TCC, 2017)</b></p> <p>In this report, Townsville City Council (2017b) considered the minimum facility requirements for a North Queensland Cultural Centre and expanded cultural precinct located in Central Park. The North Queensland Cultural Centre was required to include an art gallery, concert hall and library.</p> <p>The report found:</p> <ul style="list-style-type: none"> <li>• The demand for performance spaces in Townsville far exceeds supply</li> <li>• Strong social benefits of investing in Townsville's cultural and creative sectors, through:             <ul style="list-style-type: none"> <li>○ Strengthening the underlying values of inclusiveness, openness and democratic practice in the community</li> </ul> </li> </ul>

Report / Paper	Overview & Key Findings
	<ul style="list-style-type: none"> <li>○ Increased social capital in the community by means of enhancing residents' sense of place in the city, defining the local identity and integrating Indigenous heritage into the collective identity.</li> <li>● Strong economic benefits of investing in Townsville's cultural and creative sectors, through:             <ul style="list-style-type: none"> <li>○ Job creation</li> <li>○ Attracting skilled professionals to Townsville by increasing its 'liveability'</li> <li>○ Increased visitation.</li> </ul> </li> </ul>
	<p><b>Townsville Entertainment and Exhibition Centre: Early-Stage Assessment (Arcadis, 2018)</b></p> <p>In April 2018, the Department of State Development, Manufacturing, Infrastructure and Planning commissioned Arcadis (2018) to undertake an Early-Stage Assessment of the Townsville Entertainment, Exhibition and Convention Centre. Included in this assessment was a needs analysis and a preliminary evaluation assessment.</p> <p>The report found:</p> <ul style="list-style-type: none"> <li>● Townsville is in “desperate need” of a more modern and suited facility for art, culture, community, and youth events.</li> <li>● The current size of the facility, even with upgrades, would not meet capacity requirements after 2028.</li> <li>● The current facility additionally cannot meet the functionality requirements of modern events and will become increasingly ineffective in terms of operational expenditure.</li> </ul> <p>The report recommended:</p> <ul style="list-style-type: none"> <li>● A new facility located near the central business district</li> <li>● The facility was recommended to be a minimum of 5,000m<sup>2</sup> for exhibition or other space with an auditorium capacity of 8,000 to 10,000 people.</li> <li>● The facility should be able to accommodate developing technologies and growth in population and tourism with flexibility to increase capacity to 10,000 to 13,000 people.</li> <li>● The facility as a catalyst for cultural and economic change in the region, particularly in regard to promoting and supporting Townsville's Indigenous culture and tourism activities.</li> <li>● In the long-term, an iconic and functional multi-use Entertainment and Convention Centre would be required.</li> </ul>
	<p><b>Townsville Master Planning Strategic Analysis &amp; Reporting (Pure Projects, 2017)</b></p> <p>Council commissioned Pure Projects (2017) to provide a review of the existing CBD and the designated Priority Development Areas.</p> <p>The report found:</p> <ul style="list-style-type: none"> <li>● Strong community engagement in cultural activities and an undersupply of suitable performing spaces.</li> </ul>

Report / Paper	Overview & Key Findings
	<ul style="list-style-type: none"> <li>The need for a new concert hall with approximately 1,000 seat capacity located either within the proposed Hive Development or Central Park Arts and Cultural Centre.</li> </ul>
	<p><b>Townsville Performing Arts Centre (Troppo Architects, 2017)</b></p> <p>Townsville Community Music Centre commissioned Troppo Architects (2017) to produce detailed conceptual plans and costings for a Townsville Performing Arts Centre (TPAC).</p> <p>The proposed TPAC will include:</p> <ul style="list-style-type: none"> <li>The Civic Theatre and its extension building</li> <li>A small theatre of approximately 200 seats,</li> <li>A medium sized theatre in concert hall structure of approximately 800 seats (600 stall seats and 200 balcony seats)</li> <li>A larger foyer which can be used as a flat floor venue</li> <li>The possibility of integrating an outdoor performance venue with a capacity of 2,000 people.</li> <li>The total cost of the development was estimated to be \$74.4 million, with the Concert Hall representing the largest portion of the costs.</li> </ul>
	<p><b>Feasibility Study For a Concert Hall in Townsville (Jennifer Bott AO, 2017)</b></p> <p>Jennifer Bott AO (2017) was engaged by Council to undertake a scoping study for a concert hall in Townsville (note: despite its name, the report did not examine the feasibility of the opportunity). Bott found that an additional cultural facility is “desperately needed” due to the demand for cultural facilities in Townsville not being met by the supply.</p> <p>The report recommended:</p> <ul style="list-style-type: none"> <li>The development of concert hall and a surrounding cultural complex.</li> <li>The concert hall to have capacity for 800 to 1,000 seats and a stage.</li> <li>The surrounding cultural complex to include a small multi-use gallery, a 250-seat black box studio space/theatre, a large foyer, storage space and a bar/café/restaurant.</li> <li>The Hive or Central Park as the preferred locations for the cultural complex due to their proximity to the CBD and other relevant amenities.</li> <li>The governance and management of the concert hall should be independent from the Council but responsible to it for the delivery of financial and performance obligations.</li> </ul>
	<p><b>A Response To The Bott Report (Simon McConnell, 2017)</b></p> <p>In a critical response to Bott’s Feasibility Study for a Concert Hall in Townsville, Simon McConnell (2017) claimed the report failed to address Townsville’s most urgent needs. McConnell believed Townsville’s greatest need to be firstly for a small and a medium sized theatre and subsequently for an outdoor theatre.</p> <p>McConnell found the concert hall proposed by Bott to be larger than what was required for Townsville, preferring a smaller and more flexible venue which could accommodate multiple uses.</p>

Report / Paper	Overview & Key Findings
	<p>McConnell ultimately advocated for the progression of the TPAC proposal, citing its strong economic and logistical performance and its potential to become an iconic venue.</p>
	<p><b>Townsville Central Park Cultural Precinct (AECOM, 2018)</b></p> <p>AECOM (2018) was engaged by Council to produce a concept design for the Townsville Central Park Cultural Precinct located at Central Park and Dean Street Carpark. The design was intended to guide Council in their goal of creating a key public open space on the Townsville Waterfront CBD where entertainment and culture would be celebrated.</p> <p>The report found:</p> <ul style="list-style-type: none"> <li>• Sufficient demand within Townsville for a 1,000-seat concert hall</li> <li>• Sufficient demand for an Indigenous cultural centre</li> </ul>
	<p><b>Townsville Concert Hall (AECOM, 2019)</b></p> <p>AECOM (2019) was commissioned by Townsville City Council to evaluate the rationale for a 1,000-seat concert hall in the Townsville City Centre.</p> <p>The report found:</p> <ul style="list-style-type: none"> <li>• Economic benefits to Townsville Local Government Area of:             <ul style="list-style-type: none"> <li>○ \$86.9 million worth of additional output (including \$36.8 million directly) and 272 full time equivalent (FTE) jobs (105 directly) during the construction phase</li> <li>○ \$10.8 million worth of additional output on an annual basis (including \$4.8 million directly) and 55 FTE jobs (including 33 directly) in the operational phase</li> </ul> </li> <li>• A range of socio-economic benefits to the Townsville community, including:             <ul style="list-style-type: none"> <li>○ An increase in visitation</li> <li>○ The provision of high-quality events</li> <li>○ Enhancing Townsville's inner-city profile</li> <li>○ Boosting local and regional resident's pride and sense of importance</li> <li>○ Supporting local artists and performers and providing opportunities for their artistic growth</li> <li>○ Increased opportunities for volunteerism</li> <li>○ Meeting the current demand for an additional cultural facility</li> <li>○ Expansion of friendship groups and sense of belonging in the community</li> </ul> </li> </ul>
	<p><b>North Australia Concert Hall and Arts Precinct (Townsville City Council, 2019)</b></p> <p>To address the well-established shortage of cultural facilities in Townsville, Council in 2019 proposed the North Australia Concert Hall and Arts Precinct (NACHAP) and produced an associated Business Case.</p> <p>The precinct was proposed to include:</p> <ul style="list-style-type: none"> <li>• A 1,000-seat concert hall</li> <li>• A conservatorium of music comprising of:             <ul style="list-style-type: none"> <li>○ A 400-seat performance and rehearsal space,</li> </ul> </li> </ul>

Report / Paper	Overview & Key Findings
	<ul style="list-style-type: none"> <li>○ Teaching rooms, and</li> <li>○ Office and support services</li> </ul> <ul style="list-style-type: none"> <li>● A flexible, multi-use visual arts gallery with a storage area for the Townsville Art Collection, workshop areas and office and administrative spaces.</li> </ul> <p>To support this development Council sought \$80 million in funding from State and Federal Governments across three financial years. The investment was expected to generate:</p> <ul style="list-style-type: none"> <li>● \$175 million of additional output (including \$64 million directly) and 671 FTE jobs (including 195 directly) during construction.</li> <li>● \$12 million of additional output and 83 FTE jobs during the operation phase.</li> </ul>
	<p><b>Townsville Exhibition Centre (AEC, 2019)</b></p> <p>In 2019, AEC Group was commissioned to develop a conceptual design for the Townsville Exhibition Centre, designed to host expos, instead of conferences, which is a gap in the regional Queensland market.</p> <p>The proposed design included:</p> <ul style="list-style-type: none"> <li>● Three exhibition halls totalling 9,000m<sup>2</sup>,</li> <li>● A 2,250m<sup>2</sup> foyer,</li> <li>● 2,200m<sup>2</sup> of office or meeting spaces and</li> <li>● 600m<sup>2</sup> of amenities</li> <li>● The development was estimated to cost a total of \$40.1 million.</li> </ul>
	<p><b>Townsville Entertainment &amp; Exhibition Centre: Concept Proposal Draft (Cox, 2021)</b></p> <p>In 2021, Cox was commissioned to develop a concept proposal for a Townsville Entertainment and Exhibition Centre located at the Dean Street Carpark site. The proposed Townsville Entertainment and Exhibition Centre comprised the following elements:</p> <ul style="list-style-type: none"> <li>● A 6,000-seat sport arena</li> <li>● A 5,200-seat entertainment arena</li> <li>● A 1,000-seat concert hall and performing arts space</li> <li>● A 3,200m<sup>2</sup> exhibition space</li> <li>● A 1,600-person ballroom and banquet facility</li> <li>● 10 meeting or breakout rooms</li> <li>● A carpark of approximately 500 spaces</li> <li>● Large vehicle access and loading facilities</li> </ul>

Report / Paper

Overview & Key Findings



**Northern Australia Cultural Precinct (TaskforceNQ, 2021)**

TaskforceNQ published an advocacy paper for a cultural precinct in Townsville City. The proposed development, referred to as the North Australia Cultural Precinct would include:

- A 1,000-seat concert hall,
- A conservatorium of music,
- A 6,000-seat entertainment and exhibition centre and
- A multi-use art gallery.

The total required investment for the development was estimated to be \$292 million.

In addition to the range of unrealized social benefits, TaskforceNQ estimated the lack of cultural infrastructure in Townsville to have cost the region \$12 million in missed opportunities and 51 ongoing jobs.



**North Australia Concert Hall and Arts Precinct (TEL, 2021)**

Townsville Enterprise (TEL) (2021) published a paper in collaboration with the Council advocating for the progression of the North Australia Concert Hall and Arts Precinct as a key commitment under the Townsville City Deal.

In addition to a range of socio-economic benefits, the precinct was estimated to deliver 934 construction jobs, 55 ongoing jobs and 2,242 indirect jobs.

With the paper, TEL sought the rapid delivery of a detailed business case for the Concert Hall with a \$98 million commitment subject to the outcomes of the business case and a further \$220 million to deliver the entire Arts Precinct.



**Townsville Performing Arts Centre (TPAC, 2017)**

TPAC (2021) developed a report advocating for the progression of the initial concept designs that were developed for the centre in 2017.

The report found:

- Insufficient demand for a stand-alone concert hall, proposing instead a recital hall with the same acoustics as a concert hall but with the layout of a drama theatre.
- The co-location of the proposed theatres in the NACHAP proposal with art galleries to be problematic.
- Cost savings by pursuing the TPAC development as opposed to other proposals as a result of utilizing the existing Townsville Civic Theatre and by minimising the required supporting amenities.

TPAC would require a capital investment of \$75 million and would operate at an annual deficit of \$0.5 million

Report / Paper	Overview & Key Findings
	<p><b>The Hive Concert Hall and Playhouse Theatre (Gleeson Group, 2022)</b></p> <p>In 2022, Gleeson Group (2022) developed a summary paper on the recent developments and proposals for a concert hall and playhouse theatre at the Hive.</p> <p>In 2018, Council granted the Hive preliminary development approval for a 1,000-seat concert hall and a 350-seat playhouse theatre with an accompanying parking facility. The concert hall would be a multi-use venue with facilities to accommodate a wide range of performances, conventions and other events.</p>

## DETAILED REVIEW OF KEY DOCUMENTS

The below sections contain a more detailed review of key documents.

### Towards a Cultural Plan for Townsville

In May 1999, Townsville City Council (henceforth referred to as Council) engaged Positive Solutions (1999) to produce a Cultural Planning Document for the city of Townsville in collaboration with the Council's Community and Cultural Development Department. Positive Solutions developed *Towards a Cultural Plan for Townsville* as a planning piece for the document. By first creating the framework for the Cultural Planning Document Positive Solutions aimed to ensure Council were united and clear in their objectives for the document. *Towards a Cultural Plan for Townsville* also provides demand and planning insights for a dedicated performing arts venue and the redevelopment of Victoria Bridge into a visual arts centre.

The report outlined the proposed vision and aims of the Cultural Planning Document and the strategies to achieve them. The proposed vision for the Cultural Planning Document positions the cultural sector as supporting the Vision for Townsville as a "prosperous and vibrant city where people enjoy living and working" through the integration of cultural development and creative activity into all future planning of the city. The proposed objectives of the Cultural Planning Document captured the desire to enhance the cultural landscape of Townsville through increased provision of infrastructure, integration of cultural considerations in local and regional planning, identifying partnership opportunities for Townsville City Council and increased accessibility of cultural opportunities.

Particularly relevant to the case of the Townsville Concert Hall are the findings of the assessment of a dedicated performing arts venue. Based on surveys of cultural organisations and residents, the report identified demand for a new performing arts space, smaller than the current Townsville Civic Theatre. Without specifying a specific capacity range, the scale of the proposed facility is between 800m<sup>2</sup> and 1,200m<sup>2</sup> and was estimated to cost between \$2 million and \$3.6 million to construct. The report also found a subsidy of between \$125,000 and \$150,000 is likely to be required to operate the establishment with minimum staff and a rental cost that ensure high utilisation.

### A Cultural Plan for Townsville

Following the *Towards a Cultural Plan for Townsville* report, Positive Solutions (2001) progressed in producing a draft Cultural Planning Document for the city of Townsville. Incorporating the outcomes of the Council's review, *A Cultural Plan for Townsville* built on the previous report. The aim of the report was to produce a Cultural Planning Document which provided a clear direction for the development of cultural facilities and activities, progress the planning for a flexible performing arts space, have specific consideration for the redevelopment of the Central Business District and cultural infrastructure of the city, and consult with cultural organisations and the community to inform assessments of cultural activity and resources in Townsville. The key elements of the Cultural Plan outlined in the review of the previous report remained the same in *A Cultural Plan for Townsville*.

As previously, the report presented the findings of the assessment of a dedicated performing arts venue with the key elements of the assessment remaining the same. Based on surveys of cultural organisations and residents,



the report identified demand for a new performing arts space, smaller than the current Townsville Civic Theatre, with a capacity of 200 to 250 people. The report found the facility should be located in the CBD and should be between 800m<sup>2</sup> and 1,200m<sup>2</sup>. The proposed development was estimated to cost between \$2 million and \$3.6 million to construct. The report also found a subsidy of between \$125,000 and \$150,000 is likely to be required to operate the establishment with minimum staff and a rental cost that ensures high utilisation.

### Barriers to Major Events in Townsville

In 2016, Townsville Enterprise Limited (TEL) appointed ACEOM (2016) to undertake an assessment of the barriers to major events in Townsville. TEL is a not-for-profit organisation focused on driving economic development and attracting major investment to the Townsville region. In undertaking the assessment, ACEOM performed desktop research and a series of interviews with key stakeholder groups in the Townsville event industry.

The report highlights the potential of major events to deliver substantial economic and social benefits to Townsville and North Queensland. Major events can promote economic prosperity by increasing visitation, increasing the economic activity of residents and supporting the local businesses servicing the event. Social benefits gained from major events include increased opportunities for social connectivity, recreation, volunteering and supporting community groups.

Interviews with key stakeholders identified the following overarching barriers to major events in Townsville:

- **Weather:** The peak touring season for prominent international artists coincides with Australian summer, when Townsville is hot, wet and humid. With the largest venue in Townsville being an open-air stadium, promoters and concert attendees considered the impacts of weather to be a significant risk.
- **Event profitability:** At the time of the report, stakeholders noted that promoters generally perceived the Townsville economy to be poor and that local audiences would be unwilling to pay the price required to make the event financially viable.
- **Distance and logistics:** Distance and cost made bringing a major event to Townsville logistically challenging, high costs for local equipment and increased travel costs due to distance makes Townsville a financially unsound.
- **Existing venue options:**
  - Existing venues were seen by promoters as being unsuitable for their needs due to distance, weather concerns, poor facilities and low capacity.
  - Existing venues were not considered to be central enough and did not have sufficient access to public transportation or parking
- **Lack of support:**
  - Promoters felt unsupported by local venues and Townsville City Council when touring to the region, noting the high financial risk of doing so and the lack of incentives.
  - Advertising was considered to be insufficient to promote events.
- **Reputational damage:** A history of financially failed events impacts promoters' perception of the financial risk of touring in Townsville.

To attract major events, Townsville must have a suitable venue that meets modern requirements and equals or exceeds the standard of comparable venues in competing locations. AECOM recommended the establishment of a new event venue. To address the barriers raised by stakeholders the venue should be:

- protected from weather,
- have flexible seating modes and configurations,
- have a convention centre with capacity for over 5,000 people,
- have the required stage, lighting, and sound infrastructure as well as easy access for deliveries,

- be supported by public transport and parking, and
- be centrally located.

These recommendations should be considered in the process of planning for the Townsville Concert Hall.

#### Townsville Entertainment and Convention Centre: Site Feasibility Study

After having identified the need for a high quality, secure venue which can accommodate dialogue, meetings, performances and gatherings of international and regional scope, Council commissioned Cox Rayner (2010) to perform a preliminary comparative site analysis of six potential locations for a new Townsville Entertainment and Convention Centre (TECC). The report considered a new TECC which would meet the requirements of a 5,200-seat arena, a 3,000m<sup>2</sup> exhibition space, a ballroom or banquet capacity of 1,800 people and 12 meeting rooms.

**Figure C.1 Townsville Entertainment and Convention Centre Site Options**



Source: Cox Rayner (2010)

Ultimately, the Dean Street location satisfied the most criteria for a new TECC and was the preferred site under this report. In favour of the Dean Street location, the report found:

- The site to be in close proximity to the CBD and a short distance to hotel and restaurant amenities.
- The site to be easily accessible via public and private transport with access to bus services, potential for onsite parking, access to the site from four sides and connection to a major feeder road into the CBD.
- The site to have sufficient capacity to accommodate the current needs of the TECC as well as capacity for potential future development including parking and public transport facilities.
- The location of the site to be well-positioned for the development of a high visibility, iconic building due to its close proximity to the CBD and Castle Hill and potential to link to the river.

The report recommended for the Dean Street location to be progressed in future planning for a new TECC.

### Townsville Entertainment and Convention Centre Redevelopment Report

Gary Grimmer & Company (2010) was commissioned by the TECC to assess the need to refurbish or expand the existing venue and provide recommendations for its future development. The report was primarily intended to assess the adequacy of the TECC as a meetings, convention, and exhibition facility and will include an assessment of the venue as a sport and entertainment facility. In performing this assessment Gary Grimmer & Company held a series of interviews with key stakeholders, business leaders and patrons of the venue and performed a site inspection of the TECC and the adjacent Jupiter's Hotel Casino.

The report found the TECC to be unsuitable for business events and outdated in terms of its aesthetic and facilities. While noting that Townsville is well-positioned to be a destination for business events, the report found the TECC to be unsuitable to business events with over 200 attendees and lacking flexibility in arrangements and proportional space for plenary, breakouts, catering and exhibits. For general use, the venue required significant investment in the structural, technical, and functional aspects of the venue with further investment required to improve the flexibility, capacity, aesthetic and marketability of the venue.

The final recommendation of the report was to demolish the existing TECC and construct a new multi-purpose facility on Dean Street. The proposed venue would accommodate business, sporting and entertainment events in a more central location. With an arena capacity of 5,200 seats (also serving as a banquet or exhibition space) and 12 meeting rooms the total construction area would be 22,663m<sup>2</sup> at a capital cost of \$127 million. The new venue was expected to generate an average economic benefit of \$96.5 million per year over 20 years.

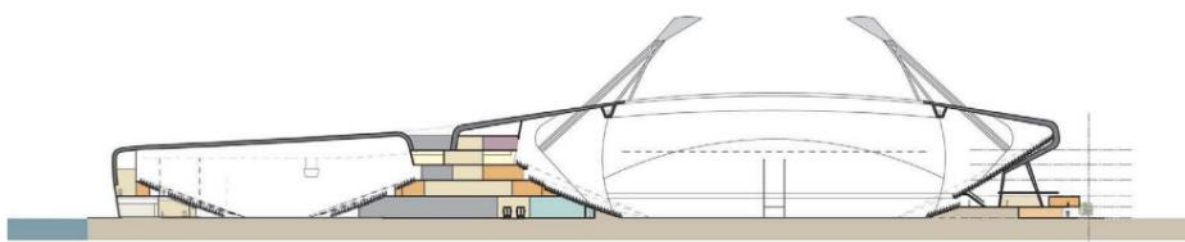
### Feasibility Study for a New Sport, Entertainment and Convention Facility in Townsville

KPMG (2013) was engaged by Council to develop a feasibility study and concept design for new or redeveloped sporting, entertainment and convention centre facilities in light of Townsville's two primary sporting and entertainment venues, TECC and Willow Sports Complex, nearing the end of their economic useful lives. The objectives of this study were to determine the need, cost, location, form and function of the new facility; consider and finalise funding and other necessary commitments; and develop a detailed feasibility study for the construction of a new sports, entertainment and convention facility.

The report found strong support for the continued presence of both a major sporting stadium and an entertainment arena in Townsville. In consideration of the exiting sporting and event calendar the report recommended the Willow Sport Complex to be demolished and rebuilt on a CBD site. This would allow for the undisturbed continuation of the existing schedule and would avoid the costs associated with the temporary impact of renovations on capacity. While the report supports the continued presence of an entertainment arena in Townsville, it did not find support for the development of a dedicated facility due to limited incremental benefit to Queensland and the likely addressing of market needs by private sector developments. As such, the report recommended the demolition of the existing TECC and the development of a 6,000-person capacity flexible entertainment arena, capable of hosting entertainment events, conventions, exhibitions and other corporate events.

The report recommended the development of an integrated stadium and entertainment centre. The proposed development would bring together the stadium of 30,000-person capacity and the entertainment centre of 6,000-person capacity along a shared spine, as illustrated below. After performing the final assessment on both the Devine and Dean St sites, the report marginally favored the Dean Street site at an estimated cost of \$316.0 million including land acquisition and demolition and divestment costs. Full public financing was suggested to be required for the project.

**Figure C.2. Integrated Stadium and Entertainment Centre Concept Design**



Source: KPMG (2013)

### North Queensland Arts and Cultural Centre: Scoping Report

In this report, Townsville City Council (2017b) considered the minimum facility requirements for a North Queensland Cultural Centre and expanded cultural precinct. The North Queensland Cultural Centre was required to include amenities for the proposed Art Gallery of North Queensland, concert hall and CityLibraries: Main Branch. The proposed development would be located in the Central Park as part of The Waterfront initiative.

The report emphasised the social and economic benefits of investing in Townsville's cultural and creative sectors. Strong cultural investments were linked to strengthening the underlying values of inclusiveness, openness and democratic practice in the community. Investment in a major cultural facility was also anticipated to increase social capital in the community by means of enhancing residents' sense of place in the city, defining the local identity and integrating Indigenous heritage into the collective identity. Immediate economic benefits of job creation and the more long-term benefit of attracting skilled professionals to Townsville by increasing its 'liveability' were also anticipated to bring significant economic benefits. Cultural tourism was understood by the report to be one the largest and fastest growing global tourism markets with cultural industries increasingly used to draw visitors. The Council noted that the demand for performance spaces far exceeds the availability of spaces with Council's three performance spaces reaching 74.5% occupancy in 2014/15 and 110 show bookings being turned away, including state and nation tourism productions.

The concert hall proposed in conjunction with the Cultural Centre would service the entire North Queensland region and would be the only facility of its nature outside Southeast Queensland. The concert hall was proposed to be 3,834.5m<sup>2</sup> in total size with a 700-seat auditorium and a stage of approximately 22x18m to accommodate a 60-piece philharmonic orchestra. The space would be utilised by Townsville City Council – Performing Arts to facilitate the demand from touring companies and promoters in addition to expanding Council's public program of concerts.

### Townsville Entertainment and Exhibition Centre: Early Stage Assessment

In April 2018, the Department of State Development, Manufacturing, Infrastructure and Planning commissioned Arcadis (2018) to undertake an Early-Stage Assessment of the Townsville Entertainment, Exhibition and Convention Centre. Included in this assessment was a needs analysis and a preliminary evaluation assessment. The report presents the results of the assessment of Townsville's short-, medium- and long-term needs in terms of an event facility. The results from the study were intended to form the foundations for a Business Case.

The report found that Townsville is in "desperate need" of a more modern and suited facility for art, culture, community, and youth events. The economic and financial analysis found that the current size of the facility, even with upgrades, would not meet capacity requirements after 2028. The current facility additionally cannot meet the functionality requirements of modern events and will become increasingly ineffective in terms of operational expenditure. The report did not, however, recommend a traditional Entertainment Exhibition and Convention Centre for Townsville, such as those seen in Cairns and Brisbane.

The report concluded that in the short-term a new facility was required near the central business district (CBD) that could meet modern business and entertainment industry standards and could capture the demand for events that were being held at less suitable venues or were not being held in Townsville at all due to a lack of appropriate facilities. The facility was recommended to be a minimum of 5,000m<sup>2</sup> for exhibition or other space with an auditorium capacity of 8,000 to 10,000 people. To satisfy medium-term needs the report concluded that the facility should be able to accommodate developing technologies and growth in population and tourism with flexibility to increase capacity to 10,000 to 13,000 people. The facility was also recommended to be used to support cultural and economic change in the region, particularly in regard to promoting and supporting Townsville's Indigenous culture and tourism activities. In order to satisfy long-term need the report recommended an iconic and functional multi-use Entertainment and Convention Centre which is capable of hosting national and international events as well as satisfying local needs.

### Townsville Master Planning, Strategic Analysis and Reporting

Council commissioned Pure Projects (2017) to provide a review of the existing CBD and the designated Priority Development Areas. The purpose of the review was to provide an updated Master Plan that would enable the reactivation of Townsville's Town Centre.

The report identified strong community engagement in cultural activities and an undersupply of suitable performing spaces. Events that are held annually were mostly oversubscribed and the Civic Theatre was booked out all year with no capacity to facilitate additional performances. The 900-seat venue was considered to be unlikely to be able to cater for the growth in interest in events given the current strain on resources.

In their analysis of Townsville’s cultural centres and activities, Pure Projects identified a need for a new concert hall with approximately 1,000 seat capacity. The proposed concert hall was recommended to be located in either within the proposed Hive Development or Central Park Arts and Cultural Centre. Both locations would be sufficiently close to the CBD and in close proximity to complementary amenities including a library and art gallery at the Central Park Arts and Cultural Centre and Reef HQ and the Museum of Tropical Queensland at the Hive Development.

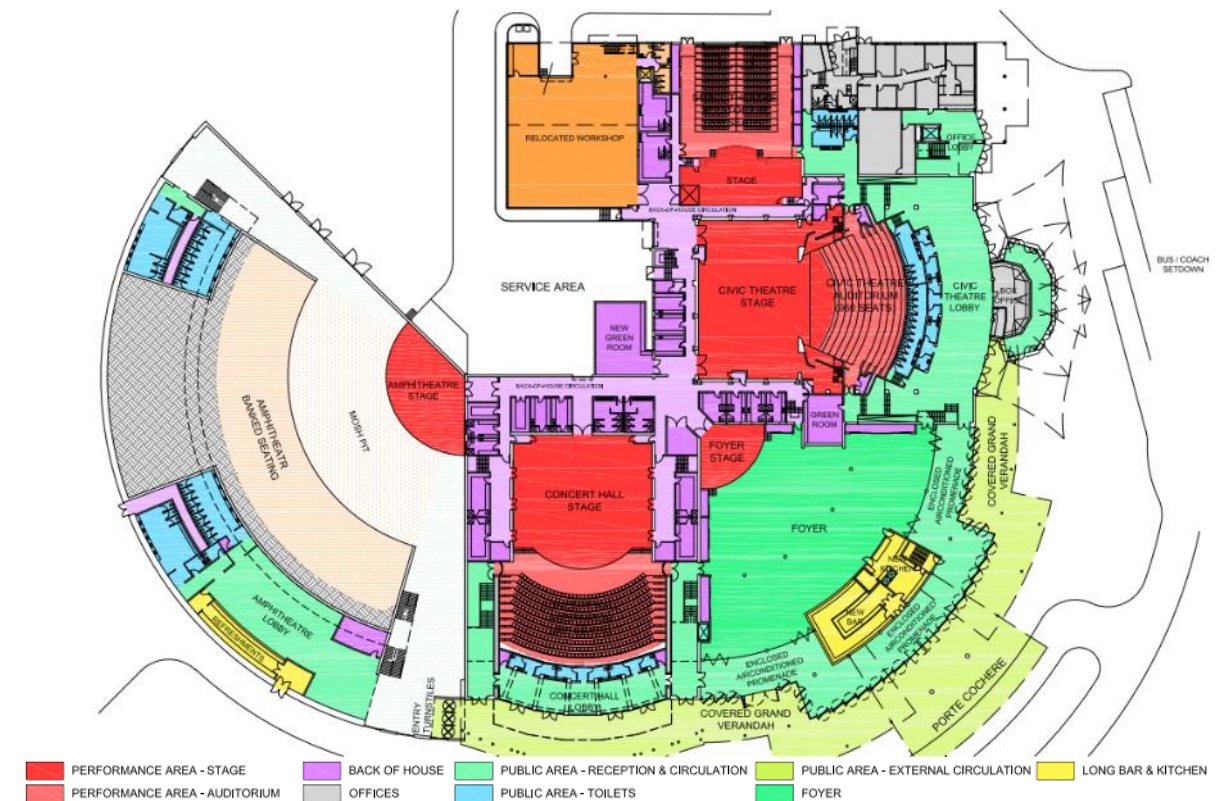
### Townsville Performing Arts Centre Concept Design

Townsville Community Music Centre commissioned Troppo Architects (2017) to produce detailed conceptual plans and costings for a Townsville Performing Arts Centre (TPAC). Without venues of sufficiently high acoustic quality and a general shortage of venues, performances were observed to be frequently held in unsuitable venues or not held at all. The aim of this project was to promote a solution to the venue supply issue by developing the Civic Theatre into a Performing Arts Centre.

The proposed TPAC will include the Civic Theatre as well as a small theatre of approximately 200 seats, a medium sized theatre of approximately 800 seats (600 stall seats and 200 balcony seats) and a larger foyer which can be used as a flat floor venue. The possibility of integrating an outdoor performance venue with a capacity of 2,000 people was also included. The medium size theatre would take on a concert hall structure making it a large recital hall with an oversized stage or a concert hall with an undersized auditorium (McConnell, 2017).

The development of TPAC was considered to be the most practical and economic option in comparison to developing multiple independent venues in the city. The design made full use of the existing Civic Theatre and its extension building. By sharing front- and back-of-house facilities capital costs are reduced and administrative, staffing and equipment costs are minimised. Troppo Architects estimated the total cost of the TPAC development to be \$74.4 million, with the Concert Hall representing the largest portion of the costs at \$17.4 million.

Figure C.3. Townsville Performing Arts Centre Concept Design



Source: Troppo Architects (2017).

### Feasibility Study for a Concert Hall in Townsville

Jennifer Bott AO (2017) was engaged by Council to undertake a feasibility study for a concert hall in Townsville. The study reviewed the assumptions and progress to date in establishing the feasibility of a concert hall in Townsville, explored the possible usage and revenue streams for the hall, presented research on the business models and sustainability of other concert halls in Queensland, and provided a proposed development scenario with a business case for the Council to consider.

Bott found that an additional cultural facility is “desperately needed” due to the demand for cultural facilities in Townsville not being met by the supply. At the time of writing, the Townsville Civic Theatre was booked out at least 2 years in advance. Community groups with activities planned in advance were well-positioned to secure bookings before touring companies were able to book tours. The lack of space in the schedule also impacted the possibility of nurturing local talent and building audiences through collaborations, festivals, local productions and other entrepreneurial events. Bott found this to negatively impact the community in its ability to make music and engage audiences and impeded the vitality and growth of the city’s entertainment and cultural life.

The report recommended that a concert hall would reduce the demand on the Townsville Civic Theatre and would fill a gap in Townsville’s venue offering. A concert hall and a surrounding cultural complex was suggested to be developed within close proximity to the CBD. The concert hall was recommended to be a shoe-box design with approximately 800 to 1,000 seats and a stage. The surrounding cultural complex was recommended to include a small multi-use gallery, a 250-seat black box studio space/theatre, a large foyer for functions, storage space and a bar/café/restaurant. The Hive or Central Park were brought forward as the preferred locations for the cultural complex due to their proximity to the CBD and other relevant amenities. Bott additionally recommended that the governance and management of the concert hall should be independent from the Council but responsible to it for the delivery of financial and performance obligations.

### A Response to the Bott Report

In a critical response to Bott’s *Feasibility Study for a Concert Hall in Townsville*, Simon McConnell (2017) claimed the report failed to address Townsville’s most urgent needs. McConnell believed Townsville’s greatest need to be firstly for a small and a medium sized theatre and subsequently for an outdoor theatre. McConnell found the concert hall proposed by Bott to be larger than what was required for Townsville, preferring a smaller and more flexible venue which could accommodate multiple uses.

While acknowledging the unmet demand for cultural facilities in Townsville, McConnell refuted the claim that a dedicated concert hall would be the appropriate venue to satisfy the demand. The existing demand for a concert hall was estimated to total 18 days of performance, including one day for the Queensland Symphony Orchestra, three days for the Barrier Reef Orchestra, one day for the symphony orchestra section of the Eisteddfod, nine days of the Australian Festival of Chamber Music and one concert for each of the four school symphony orchestras. In comparison, the estimated demand for a recital hall totalled 87 days. McConnell noted that demand for theatre use generally follows the establishment of a venue, rather than preceding it, but finds the difference in the existing demand for each venue to be indicative of the type of venue required for Townsville.

McConnell supported the proposal to construct the new facilities in the form of a performing arts centre but deemed the proposed locations for the centre to be unsuitable. The report noted the critical greenspace provided by Central Park as one of two green areas in the CBD. In consideration of the streetscape provided by the old trees in the park and its crucial role as the main recreational node in the Waterside Promenade development, McConnell rejects the site as a suitable location for the cultural centre. Townsville City Council had already rejected the proposed development at The Hive following an expression of interest process.

McConnell ultimately advocated for the progression of the TPAC proposal, citing its strong economic and logistical performance and its potential to become an iconic venue.

### Townsville Central Park and Cultural Precinct

AECOM (2018) was engaged by Council to produce a concept design for the Townsville Central Park Cultural Precinct located at Central Park and Dean Street Carpark. The design was intended to guide Council in their goal of creating a key public open space on the Townsville Waterfront CBD where entertainment and culture would be

celebrated. The development was intended to enhance the physical, community and economic stimulation resulting from the new North Queensland Stadium.

As part of the concept design, AECOM performed a market analysis of commercial developments and arts and cultural activities in the area. They found sufficient demand within Townsville for a 1,000-seat concert hall given the strong projected growth, high existing participation in music and arts, and strong utilisation of the Civic Theatre. The alternative of incorporating the concert hall into the broader Hive project was considered in the market analysis but was rejected on the basis of further isolating the Civic Theatre, not leveraging the North Queensland Stadium, further concentrating activity toward The Strand and North Ward side of the CBD and the insufficiency of demand to constitute a concert hall development at both locations. They additionally found sufficient demand for a proposed Indigenous Cultural Centre given limited Indigenous cultural offerings in Townsville.

**Figure C.4. Central Park Cultural Precinct Concept Design**



Source: AECOM (2018)

### Townsville Concert Hall: Position Paper

AECOM (2019) was commissioned by Townsville City Council to evaluate the rationale for a 1,000 seat concert hall in the Townsville City Centre. The report aimed to identify gaps in three prior studies produced for Council, review case study venues in similar locations, perform a high-level economic analysis, identify the socio-economic benefits and opportunity costs of a new venue and provide recommendations.

In support of AECOM, AEC Group performed an independent Economic Impact Assessment using input-output modelling techniques. The analysis specifically looked at the economic impacts associated with the construction of the concert hall and the operations associated with the concert hall's events. The construction of the concert hall was estimated to cost \$46 million and was expected to generate significant economic benefits within the Townsville Local Government Area (LGA), including \$86.9 million worth of additional output (including \$36.8 million directly) and 272 full time equivalent (FTE) jobs (105 directly). The concert hall's operational activities were estimated to provide \$10.8 million worth of additional output to Townsville LGA on an annual basis (including \$4.8 million directly) and 55 FTE jobs (including 33 directly).

A range of socio-economic benefits to the Townsville community as a result of the concert hall were additionally identified, including:

- An increase in visitation to the region with major events attracting a large number of visitors
- The provision of high-quality events for participants and spectators
- Enhancing Townsville's inner-city profile as a thriving activity hub
- Boosting the pride and sense of importance of local and regional residents
- Supporting local artists and performers and providing opportunities for their artistic growth
- Increased opportunities for volunteerism which may not be otherwise available in the North Queensland music industry
- Meeting the current demand for an additional cultural facility
- Expansion of friendship groups and sense of belonging in the community with live performance attracting like-minded people

#### North Australia Concert Hall and Arts Precinct: Business Case

To address the well-established shortage of cultural facilities in Townsville, Council proposed the North Australia Concert Hall and Arts Precinct (NACHAP) and produced an associated Business Case. The Council noted the existence three key sites that would be suitable for the development of the NACHAP but did not specify where they were. The precinct was proposed to include:

- A 1,000-seat concert hall
- A conservatorium of music comprising of:
  - A 400-seat performance and rehearsal space
  - Teaching rooms, and
  - Office and support services
- A flexible, multi-use visual arts gallery with a storage area for the Townsville Art Collection, workshop areas and office and administrative spaces.

The NACHAP offered an opportunity to develop infrastructure that will economically uplift and will provide ongoing jobs. The report highlights the significant economic unrest Townsville had experienced in recent years from natural disasters, high unemployment and changes to the services and manufacturing industry that had a significant impact on the region. During construction, Council expected the development would generate \$175 million of additional output for the Townsville LGA (including \$64 million directly) and would generate 671 FTE jobs (including 195 directly). In terms of annual benefit, Council expected NACHAP to provide \$12 million of additional output for the Townsville LGA and 83 FTE jobs. To support this development Council sought \$80 million in funding from State and Federal Governments across three financial years.

#### Townsville Exhibition Centre: Concept Design

In 2019, AEC Group was commissioned to develop a conceptual design for the Townsville Exhibition Centre. The centre was proposed to be located southwest of the North Queensland Stadium. The proposed design included three exhibition halls totalling 9,000m<sup>2</sup>, a 2,250m<sup>2</sup> foyer, 2,200m<sup>2</sup> of office or meeting spaces and 600m<sup>2</sup> of amenities and was estimated to cost a total of \$40.1 million.



Figure C.5. Townsville Exhibition Centre Concept Design



Source: AEC (2021).

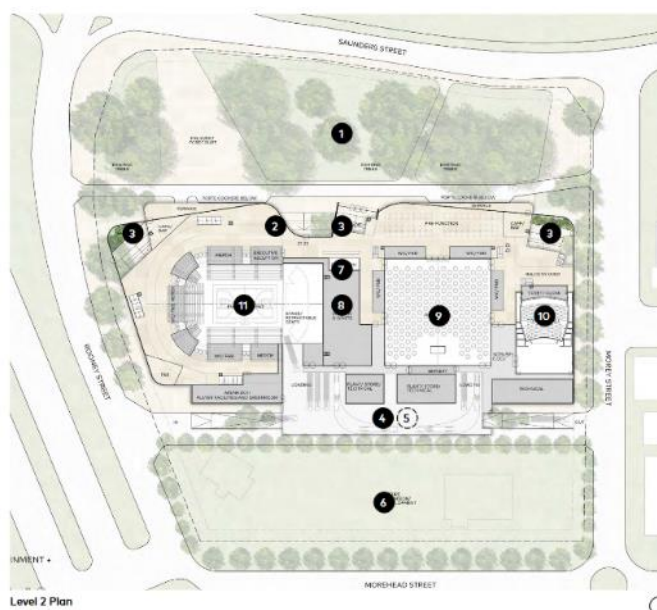
#### Townsville Entertainment and Exhibition Centre: Concept Proposal DRAFT

In 2021, Cox Rayner was commissioned to develop a concept proposal for a Townsville Entertainment and Exhibition Centre. The development was proposed to be located at the existing Dean Street Carpark site. The proposed Townsville Entertainment and Exhibition Centre comprised the following elements:

- A 6,000-seat sport arena
- A 5,200-seat entertainment arena
- A 1,000-seat concert hall and performing arts space
- A 3,200m<sup>2</sup> exhibition space
- A 1,600-person ballroom and banquet facility
- 10 meeting or breakout rooms
- A carpark of approximately 500 spaces
- Large vehicle access and loading facilities.

**Figure C.6. Townsville Entertainment and Exhibition Centre Concept Proposal**

- 1. Parkland forecourt**  
The building is set back from the street to create a green, shaded arrival and event forecourt and retain significant existing trees.
- 2. Elevated concourse**  
Affords views of Ross Creek and Castle Hill, and conceals significant parking.
- 3. Operational zoning**  
Three entry foyers provide legible address and circulation, and support building zoning according to events program.
- 4. Loading efficiency**  
Concealed rear loading serves all key facilities at a single level, accessed by a highly efficient one-way service vehicle concourse.
- 5. Concealed parking**  
At ground carpark maximised parkland, avoids heat island effect. May be sleeved to north and south street edges.
- 6. Future development opportunity**  
Eastern portion of site is preserved for future development and/or expansion at Morehead St.
- 7. Central administration**  
Central reception/ administration serves all facilities and is positioned with views of Castle Hill.
- 8. Central catering**  
The central kitchen location achieves most direct access to Arena, Great Hall and front of house, providing efficient service movement.
- 9. Multi-modal venues**  
Great Hall offers maximum flexibility, supporting up to four concurrent function spaces
- 10. Concert Hall**  
The Concert Hall is adaptable for a variety of performance and function modes. The end location allows for dedicated entry.
- 11. Arena atmosphere**  
Retractable seats on four sides achieves maximum atmosphere in sports mode and intimacy in flat floor entertainment mode and concert mode.



Source: Cox Rayner (2021)

### North Australia Cultural Precinct

TaskforceNQ published an advocacy paper for a cultural precinct in Townsville City. The proposed development, referred to as the North Australia Cultural Precinct would include a 1,000-seat concert hall, a conservatorium of music, a 6,000-seat entertainment and exhibition centre and a multi-use art gallery.

The development was positioned by TaskforceNQ to be a vehicle for economic growth and sustainability for the Townsville region. With insufficient infrastructure to meet current demands Townsville has been unable to accommodate touring exhibitions and major concerts, resulting in \$12 million of missed opportunities in the local economy annually and 51 ongoing jobs. TaskforceNQ estimated the total required investment for the development to be \$292 million.

TaskforceNQ noted the significant social benefits that would result from the North Australia Cultural Precinct. Such benefits include increased visitation to the region, opportunities for Indigenous storytelling, increased resident economic activity, improved Townsville recognition and branding, improved social connectivity, and improved viability of touring events.

### North Australia Concert Hall and Arts Precinct: Federal Election Advocacy

TEL (2021) published a paper in collaboration with the Council advocating for the progression of the NACHAP as a key commitment under the Townsville City Deal.

TEL noted the deficiencies of the existing facilities and the impact such deficiencies had on Townsville's cultural offering. The paper observed that the outdated venues, lack of availability and lack of suitable venues for a variety of uses restricted the growth of Townsville's cultural landscape. The construction of the NACHAP was hoped to address the shortage of suitable facilities.

The anticipated economic and socio-economic benefits of the NACHAP are noted in the report. Such benefits include increased economic activity, improved social connectivity, increased resident participation, recreation, volunteering opportunities and growing local community groups and events. The precinct is estimated to deliver 934 construction jobs, 55 ongoing jobs and 2,242 indirect jobs.

With the paper, TEL sought the rapid delivery of a detailed business case for the Concert Hall with a \$98 million commitment subject to the outcomes of the business case and a further \$220 million to deliver the entire Arts Precinct.

### Townsville Performing Arts Centre: A Vision for the Future

TPAC (2021) developed a report advocating for the progression of the initial concept designs that were developed for the centre in 2017. The key elements of the design remain as previous with:

- A 200-seat theatre
- An 800-seat theatre in concert hall format
- A 2,000-seat amphitheater
- A large foyer.

The report found there to be insufficient demand for a stand-alone concert hall. The level of demand and flow-on effects to the Townsville Civic Theatre estimated by previous reports advocating for a 1,000-seat stand-alone concert hall were claimed by TPAC to be overestimated. Such reports additionally did not address the high operation costs of the facility. TPAC advocated instead for medium sized recital hall which could accommodate with wider variety of uses. A concert hall has highly specialized acoustic architecture and does not have a fly tower, stage wings, or proscenium arch, features of a drama theatre which most performances were noted to prefer. A recital hall has the same acoustics as a concert hall but has the layout of a drama theatre, thereby filling the gap in the market for a concert hall while enabling maximum possible use of the facility.

In relation to the NACHAP, TPAC believed the co-location of the proposed theatres with art galleries to be problematic. Art gallery were said to be best located in the CBD and their co-location with the performance art facilities was not considered to provide any benefit to patrons or operators.

TPAC emphasised the considerable cost savings that could be achieved by pursuing the TPAC development as opposed to other concert hall or cultural precinct proposals. By utilizing the existing Townsville Civic Theatre and by minimising the required supporting amenities as a result of sharing between theatres, TPAC aimed to minimize capital costs and operating costs. The development was estimated to require a capital investment of \$75 million and would operate at an annual deficit of \$0.5 million, substantially lower than their assessments of other options.

### The Hive Concert Hall and Playhouse Theatre

In 2022, Gleeson Group (2022) developed a summary paper on the recent developments and proposals for a concert hall and playhouse theatre at the Hive. The Hive was considered by Gleeson to be the most appropriate location for the development due to its proximity to other tourism activity drivers.

In 2018, Council granted the Hive preliminary development approval for a 1,000-seat concert hall and a 350-seat playhouse theatre with an accompanying parking facility. The concert hall would be a multi-use venue with facilities to accommodate a wide range of performances, conventions and other events.

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