

COPY

Board of Control
September 26, 2007
Re # 14

Corporation of the City of London
London, Ontario

FEASIBILITY AND CONDITION STUDY OF CENTENNIAL HALL

FINAL REPORT

June 2007

NEVITA

301 Jane Street
Toronto, Ontario
M6S 3Z3



June 15 2007

Vic Cote
General Manager of Finance & Corporate Services
City of London
300 Dufferin Street
London, Ontario N6A 4L9

Re: Centennial Hall Final Report

Dear Vic

The following pages contain our final report pursuant to RFP 06-29 as amended by your transmittal of May 30th, 2007.

We are also submitting with this final report two background documents entitled Market Assessment Report (February 2007) and Building Condition Report (February 2007, revised May 2007).

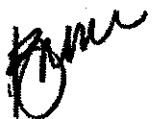
As you review this material, it will be clear that we have collectively covered a great deal of ground since we began this work last Fall.

Once the City begins to move forward with this project, it will be important to step back slightly from many details which are contained in these documents and consider the civic goals for the proposed facility and the choices which are available to achieve them.

On behalf of John Nicholson and myself, I would like to thank you, Robin and Bill for your help and guidance throughout the study process and I look forward to our meeting in your office on June 25th.

Yours sincerely

NOVITA INTERPARES LIMITED



Brian Arnott

encl

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1.0

INTRODUCTION

1.0 INTRODUCTION

1.1 City of London RFP

In the fall of 2006, the City of London issued a Request for Proposals (RFP 06-29) to consultants qualified in cultural capital planning and development to conduct a Feasibility and Condition Study of Centennial Hall.

The purpose of the proposal call was to get an assessment of the options for Centennial Hall for the next ten years including the business conditions in London and a pro forma range of options.

The range of options were to include:

- Status quo with modest annual building maintenance
- Modernization and significant improvements
- Removal and re-development and reliance on existing facilities or a new venue

1.2 Project Background

.1 Centennial Hall

Centennial Hall is a performing arts facility owned by the City of London which was constructed in 1967. It has two floors available for bookings:

- The upper level is a rectilinear concert hall with a balcony on three sides and flat-floor seating on the main level, for a total theatre seating capacity of 1,637. The main floor seats may be removed to accommodate up to 700 people in banqueting format
- The lower level is an open room with adjacent kitchen facilities for parties and private functions; it accommodates 600 people for banquet-style dinners and 700 for meetings

.2 Demand for a New Performing Arts Centre

There has been widespread community dissatisfaction with Centennial Hall for many years.

The interviews conducted over the course of this project revealed that performing arts supporters will avoid concerts at Centennial Hall because the flat-floor seating, poor sight lines, and substandard acoustics ruin their experience.

Performing artists also reported being frequently frustrated in their efforts to present their shows; they would rather not book Centennial Hall but feel they have little choice. They are concerned by the size and type of stage, inadequate and outdated equipment as well as the poor acoustics and the compromised experience of their audiences.

There have been several efforts over the past thirty years to examine the renovation or replacement of Centennial Hall with a new Performing Arts Centre (PAC). These efforts have failed through a lack of organizational capacity, political will and funds.

SEE APPENDIX A.15 FOR A LIST OF PREVIOUS STUDIES.

1.3 Policy Framework – Creative City Task Force

This report takes into account the cultural policy framework and vision outlined in the Creative City Task Force (CCTF) report submitted to London City Council in April 2005. Since then, Council has established a Culture Office and has been working toward implementing the Report's 87 recommendations.

The overall tone of the CCTF document is a call to action. This call to action is based upon the realization that there is enormous untapped creative potential in London. Mobilizing this potential is the key to London's future and the key to its ability to establish itself as the regional capital of southwestern Ontario and one of the leading creative cities in Canada.

In order for this potential to become manifest, the CCTF report states that London must begin to think differently and it must be differently perceived.

In its approach, the CCTF recommends an inclusive view of culture and an integrated approach to planning and city building.

The CCTF report states that London is very well positioned to join the world trend toward the information economy, which is driven by new technologies and away from "smokestack industries." In addition to its educational and research assets, London needs to promote its entertainment and cultural technologies.

The CCTF places a high level of emphasis on the that part of the population which is between 25 and 44 years of age both as drivers of the creative economy and as engaged citizens in a highly diversified society.

The CCTF report also notes that there is a need to connect the city to the university and to encourage students to continue to live and work in London after graduation. Similarly,

London needs to do more to integrate the growing number of newcomers to the community, and to recognize them as potential cultural innovators in the development of London as a creative city.

The CCTF calls on London to invest in new capital projects, and specifically, a new Performing Arts Centre that would replace Centennial Hall by 2015.

1.4 Methods of Work

In the course of carrying out this work, the Consultants:

- Convened conversational meetings with groups of stakeholders
- Conducted private interviews with community leaders and representatives
- Analyzed the physical and operations documents related to Centennial Hall
- Completed various condition surveys in the building
- Surveyed land use and urban planning issues in the downtown core
- Collected and reviewed background data on the London market
- Reviewed programs, presenters and facilities in the London market
- Conducted research into live performance industry trends
- Conducted research into demographic trends both locally and nationally
- Conducted research into the operation of live performance facilities and sites
- Had discussions with City representatives

FOR A LIST OF THE STAKEHOLDERS CONSULTED DURING THE COURSE OF THIS RESEARCH, PLEASE SEE APPENDIX A.1.

.1 A Note on Organizational Context

This report has been prepared to reflect the City's continuing intent to operate Centennial Hall both now and in anticipation of a replacement. While no formal governance and operating model has been determined, this report assumes that the facility will be operated in accordance with well-defined policies and goals by suitably qualified and experienced professionals.

.2 A Note on Building Typology and Standards

There are four sub-type buildings in the category of live performance venues:

- A Recital Hall has an auditorium typically seating fewer than 750 with a stage platform that is in the same enclosure as the audience. It is used mostly for chamber music and small ensembles

- A Concert Hall has an auditorium typically seating more than 1,000 with a stage platform that is in the same enclosure as the audience. It is used mostly for larger orchestral and choral performances
- A Playhouse has an auditorium typically seating fewer than 750 with a stage that is most often in a separate enclosure from the audience. It is used for spoken word performance but may also accommodate variety, dance, music theatre and music
- A Lyric Theatre has an auditorium typically seating between 1,000 and 2,500 with a stage that is in a separate enclosure from the audience. It is used for large scale music theatre and dance performance but may also accommodate variety, headliners and popular music

Reference to any future facilities in this report assumes that current industry standards for building functionality, viewing conditions, listening conditions, production systems and equipment, etc will be met in full.

1.5 Conclusions of the Report

In regard to the three objectives of the study, this report arrives at the following conclusions:

.1 Status Quo with Modest Annual Building Maintenance

Because Centennial Hall is a sub-standard venue which is at the end of its service life as a building, the status quo is not a recommended option for the City to pursue.

.2 Modernization and Significant Improvements

Because the basic design of this facility as a live performance venue is flawed and because the base building fabric and systems are substantially below current standards, the scope of the scope of modernization and improvements would be equal to constructing a new building; and because the present Centennial Hall is site not an optimal location, modernization and improvement is not a recommended option for the City to pursue.

.3 Removal and Re-development and Reliance on Existing Facilities or a New Venue

Because re-development on the Centennial Hall site is not a recommended option; and because there are no comparable existing facilities in the London market on which to rely, this report recommends that the City of London consider constructing a replacement venue as described in this report.

1.6 Recommendations

This report makes the following seven recommendations to the City of London in regard to the future of Centennial Hall:

- That the City exercises the preferred option to phase out Centennial Hall over the next ten years
- That the City consider constructing a replacement facility for Centennial Hall and opens this facility by the time Centennial Hall closes
- That the City announces its commitments and plans with respect to Centennial Hall and the potential replacement project as soon as possible
- That the ten year phase out period for Centennial Hall be coincidental with the ramp-up period for the proposed replacement facility
- That the City re-animate Centennial Hall in the ten year phase out period as a means of creating a strong and sustainable market for the proposed replacement facility
- That, in support of the goal of market development, the City makes a modest short term investment in both the capital and operation of Centennial Hall
- That the quantum of this investment is to be determined following further discussion, but that it be in the order of magnitude of \$2-3 million

2.0

EVALUATION OF CENTENNIAL HALL

2.0 EVALUATION OF CENTENNIAL HALL

2.1 First Goal of the Study

The first goal of this study was to assess Centennial Hall both as a physical building and as an operating entity, and specifically as a municipally owned and funded live performance and meeting facility.

While half the area within the Centennial Hall building (basement level) is devoted to meetings and banquets, these functions were excluded by the City from the assessment in favour of a single focus on live performance functions.

.1 Comparison with Similar Facilities

Centennial Hall is one of many mid-size, municipal performing arts centres which represent the first wave of indigenous cultural capital development in Canada.

Most of these buildings had greater seating capacity (typically, 2000 or more) than Centennial Hall and most, unlike Centennial Hall, were built with large stages and fly towers, giving them greater production capacity. Most were also built to have an orchestra as a tenant.

Only Centennial Hall in London and the Rebecca Cohn Auditorium in Halifax of this generation of buildings has not undergone substantial renovation and re-positioning in their markets to reflect the changes which have occurred over the past forty years.

2.2 Centennial Hall Condition Survey

PLEASE SEE THE BUILDING CONDITION STUDY PREPARED AS AN ADJUNCT TO THIS FEASIBILITY STUDY FOR MORE DETAILS.

The Building Condition Report examines Centennial Hall in relation to both contemporary building standards and standards for performing arts facilities. The overall findings of this report are summarized as follows.

.1 Description of Facility

Centennial Hall is a performing arts facility owned by the City of London which was constructed in 1967.

It has two floors available for bookings:

- The upper level is a rectilinear concert hall with a balcony on three sides and flat-floor seating on the main level, for a total theatre seating capacity of 1,637. The main floor seats may be removed to accommodate up to 700 people in banqueting format
- The lower level is an open room with adjacent kitchen facilities for parties and private functions; it accommodates 600 people for banquet-style dinners and 700 for meetings

.2 General Building Condition

The review of the existing Centennial Hall building concluded that:

- The structure is at or near capacity
- The building envelope is deficient in thermal and noise isolation
- The envelope needs a total new look and image
- A total electrical upgrade is required
- A total mechanical upgrade is required
- Any changes to the structure or new structure may require seismic upgrade (new requirement of Ontario Building Code)
- A total production systems upgrade is required
- While the overall building has ample area and volume for a 1,600 seat performance hall, the functions are badly deployed (e.g., half the space is below grade)

.3 Building in Relation to Performing Arts Facility Standards

Centennial Hall has major deficiencies in relation to all current standards for a performing arts facility:

- The building's image is poor
- The building's appearance does not suggest its use and function
- The public spaces are all undersized, outdated and unappealing
- The auditorium is lacking in character
- Viewing and listening conditions are sub-standard
- Staging capacity is limited even for a concert hall
- Backstage support areas are insufficient in size and number
- Production systems and equipment are inadequate and decades out of date
- The building's reputation reflects these deficiencies

.4 Other Evaluative Standards

The condition of the building with respect to life safety and workplace safety requirements was not part of this work. However, this report recommends that the City address these issues as soon as possible.

.5 Conclusion of Building Analysis

The extent of work which is required to bring Centennial Hall up to contemporary standards both as a building and as a live performance venue is so great that the building would, in essence, have to be entirely re-built.

2.3 Site Potential

.1 Site Potential for a Performing Arts Facility

On the plus side, the Centennial Hall site is fully serviced, within a civic precinct and owned by the City. The site also has the potential to be combined with the parking lot to north.

On the minus side, the site has serious limitations:

- Its footprint is not large enough for a new facility with adequate public and support spaces
- The underground parking garage limits development
- The neighbouring context is mostly residential
- It is removed from related uses such as restaurants

.2 Highest and Best Use of the Site

Through a number of discussions with real estate industry and city representatives, there were a variety of opinions expressed as to the best use of the Centennial Hall site, including mid-rise residential or city offices. Generally, no one favoured this as the site for a new live performance facility.

.3 Conclusion of the Site Analysis

The current site has too many limits to warrant development for a new facility. This report recommends that alternate sites should be explored.

**FOR MORE INFORMATION RELATED TO THE FINDINGS OF THIS SECTION, PLEASE SEE
~~THE BUILDING CONDITION STUDY~~**

3.0

TEN-YEAR PHASE OUT PROGRAM

3.0 TEN-YEAR PHASE OUT PROGRAM

3.1 Recommended Development Scenario

The evaluation of Centennial Hall which is described in the Building Condition Report and in Section 2 of this report has determined that a re-development program for Centennial Hall is not a cost effective direction to take. The evaluation process has also determined that the current Centennial Hall site is not a desirable location for a replacement facility.

This report therefore recommends that the City undertake a separate development program for a new building on another site as Centennial Hall is being phased out. The facility to replace Centennial Hall is described in Section 5 below.

3.2 Development Timetable

Assuming the adoption of the recommendations of this report by the end of 2007, a ten-year phase out program for Centennial Hall would be completed by the end of 2017.

Once the funding is in place, a new facility will take about 6 years to design and construct. If the new facility is to open in 2015 as indicated in the Creative Cities Task Force Report, some funding for the replacement facility would need to be in place by the end of 2009.

3.3 Operational Phase Out

.1 Phase Out and Ramp Up

On the subject of the phase out of Centennial Hall, this report takes the position:

- That the phase out of Centennial Hall will be occurring in parallel with the ramp-up to the replacement facility
- That Centennial Hall has a role to play in market development (both products and consumers) for the new facility
- That failure to use Centennial Hall in the ten year phase out to grow the market will adversely affect the sustainability of any new facility

.2 Communicating the City's Intentions

The future of Centennial Hall has been in a state of suspended animation for decades. If there ever was a time for a clear statement about its future, that time is now.

At its first opportunity, the City should declare its intentions with respect to Centennial Hall and make these intentions fully public. These declarations should include the following information:

- Decision to close Centennial Hall
- Date Centennial Hall will close
- Transition plan for use of Centennial Hall until closing
- Intention to replace the Centennial Hall
- Process for creating a replacement facility
- Commitment to open the new facility as Centennial is closed

.3 Re-positioning Centennial Hall

As the consultants heard time and again, Centennial Hall is unacceptable to users and audiences in its current state. It is, nevertheless, an existing assembly occupancy and a civic asset which should not be left to lie fallow.

One of Centennial Hall's obstacles as a public facility is the difference between its market position (as a "concert hall") and the reality of its building type (it is actually a general-purpose assembly hall).

If these differences between expectations and reality can be overcome, Centennial Hall ~~could play a useful and important role in the transition period~~ which would help set the stage for success in the operation of the replacement facility.

In this connection, there is a very good argument that Centennial Hall could be used much more flexibly and more creatively, and there is no question that it has a lead role to play in market development.

.4 New Mandate for Management for the Ten Year Phase Out Period

Centennial Hall currently operates mostly as a rental venue. While this role is fundamental and needs to continue, there is much more to be done if Centennial Hall is to make a contribution to development and sustainability in the ten-year interim period.

In order for the new facility to be successful, program development will have to start with Centennial Hall and the City will have to commit more money to encourage cultural development, community involvement, and market stimulation.

3.4 Transition to A New Facility

.1 Public Policy Framework

This report recommends that the transition plan for Centennial Hall should begin with a clear statement of the vision, mission and goals by the City for a new facility as a civic asset and a major player in the cultural and recreational life of London.

The current facility has been operating without a policy regarding its goals and public benefit to the detriment of cultural development in London.

.2 Product and Audience Development

If it is to be sustainable, a new facility will require a critical mass of product, presenters, partners, programs, audiences and consumers to be present on Day One of operations.

In order to ensure that there is such a critical mass, much work needs to be done in the London market on product and audience development beginning as soon as possible. Even with all its faults, Centennial Hall has a role to play in this development.

.3 Role of City as Cultural Development Facilitator

As owner of the new facility and having responsibility for its fiscal well-being, the City has a primary interest in product and audience development in the period leading up to the opening. This interest will be best served by the City taking a leadership role and being as pro-active as may be required to protect these interests.

The missing ingredient in this equation is a programming agency which has the growth of the market as its primary goal. The description of such an agency is contained in the proposed management model which is described in Section 7 of this report.

3.5 Capital Phase Out

.1 Investment in Relation to Replacement Value of the Asset

The cost of replicating Centennial Hall exactly as it currently exists is probably in the order of \$20 million (55,000 sf at about \$350/sf), not including land value and soft costs. The market value is considerably less.

Any investments which are made in the ten-year phase out period should be proportional to the value of the asset.

.2 Investment Catch-up

The City has carried out minimal routine maintenance of Centennial Hall over the years, but no investment has been made in keeping it up to a reasonable standard as a live performance venue. If Centennial Hall has a continuing role, the bills for catching up will come due during the ten-year phase out period.

.3 Immediate Investment for Safety and Risk Management

While the City appears to have ensured that life safety requirements as defined by the Ontario Building Code are being met, there are several safety and risk management issues which need immediate attention:

- All capacities, methods, techniques, practices, equipment and devices related to ~~work overhead~~ should be reviewed immediately. A full report should be brought forward covering all conditions for review and remedial action by the City.
- The current practice of using of ~~theatre style chairs attached together on skid bases~~ should be reviewed by qualified life safety experts for their potential risk in an ~~emergency evacuation scenario~~. A full report should be brought forward covering all conditions for review and remedial action by the City.
- ~~The workplace safety conditions~~ and practices for stage staff and crews should be reviewed by qualified experts. A full report should be brought forward covering all conditions for review and remedial action by the City.

An allocation amount and budget source for this work will need to be identified.

.4 Immediate Investment to Support Presenters

Much of the resistance to use of Centennial Hall is related to the inadequacies of the production systems and equipment which are extremely antiquated. Presenters will be more inclined to use the building and audiences will be better served if a modest investment is made now.

Most of the equipment purchased now for Centennial Hall would be transferable to a new facility. The cost of completely equipping a new, comparable facility will be \$2 to \$4 million.

On the basis of a walk-through review, this report recommends the following level of investment in presentation systems and equipment for Centennial Hall:

Presentation lighting	\$250,000
Audio and communications	\$250,000
Video and display	\$200,000
Rigging, draperies and track	\$350,000
Misc staging and loose equipment	<u>\$100,000</u>
Sub-total	\$1,150,000
Related infrastructure (@ 25% of sub-total)	<u>\$287,500</u>
Total	\$1,437,500

The budget allocation for this work would therefore be in the order of \$1.5 million. At least 75% of this investment would be transferable to a new facility.

.5 Investment to Support a New Management Mandate

If Centennial Hall is to be used more creatively and flexibly, an investment in the capacity of the auditorium and stage to accept new formats would be required. The City should establish a programming and marketing resource budget five years prior to opening to lay the groundwork for a successful building.

.6 Investment to Support Public Enjoyment

The public spaces in Centennial Hall are dated, dreary looking and worn out. A plan for the public space is required in order to re-gain some level of public acceptance and comfort.

As noted in Section 2 of this report, the public washroom facilities are woefully under-sized in relation to the current Ontario Building Code requirements. While this condition may be a legal non-conforming use, it is a significant disincentive to public attendance.

.7 Investment in Building Fabric and Systems

An initial assessment based on a walk-through indicated that the basic building fabric and systems would probably be sustainably operational for a further ten years.

.8 Order of Magnitude Investment Spending Total

The total of the foregoing investment spending for the ten-year phase out period may be in the order of \$2-3 million.

.9 Timing of Investment Spending

The spending which is proposed in this report to ensure that a successful transition occurs between Centennial Hall and the replacement facility should be made at the start of the phase out period.

.10 Amortization of Investment Funding

If the order of magnitude investment for the catch-up, phase out, ramp up period is seen in the context of a ten years timeframe it represents spending of about \$200,000-\$300,000 per year on an asset base of \$20 million.

If the order of magnitude investment for the ten-year catch-up, phase out, ramp up period is seen in the context of a building with a gross area of 55,000 sf, it represents spending of about \$35-\$55/sf on an asset base whose replacement cost is probably in the order of \$350/sf.

4.0

USAGE MARKET GAP

4.0 USAGE MARKET GAP

PLEASE SEE THE MARKET REPORT PREPARED AS AN ADJUNCT TO THIS FEASIBILITY STUDY FOR MORE DETAILS.

4.1 Defining The Gap

Any market for goods or services may have gaps which entrepreneurial forces will recognize and fill to everyone's advantage.

In regard to the live performance market in London, the questions are whether there are gaps in supply or demand and, if so, how these gaps might relate to Centennial Hall.

Such questions need to be addressed in the complex context of an enterprise (live performance) which is driven by an overwhelming array of available product, on the one hand, and subject to highly variable trends, tastes and preferences on the other.

In other words, the climate in which the exchange between product and consumer takes place in the live performance market is a volatile succession of emerging gaps, which are filled only to have new gaps occur moments later.

The live performance market is synonymous with continuously changing responses to ever emerging gaps, and those who operate in this environment must be flexible, adaptable, and quick.

Where then does a facility such as Centennial Hall fit?

In the course of discussions about this study, two questions have been raised about Centennial Hall's relation to gaps in the London market:

- What would be the consequences if Centennial Hall were not there?
- What is missing in the London community?

This report believes that these are, in fact, one in the same question. Centennial Hall is such a poor facility and is so reluctantly used that it has only a ghostly presence in its market.

If on the other hand, Centennial Hall were a good facility fulfilling its potential in a market of 500,000 consumers, its loss would be substantial.

This report therefore takes the position that what is missing in the London market is the potential benefits which Centennial Hall would produce were it operating effectively.

The barriers to effective operation are the building's flaws and the resulting resistance by the consuming public and the providers of product.

What London is missing is a mid-sized (1,000-2,000 seat) building:

- That meets civic needs and addresses the potential of the London market
- In which all Londoners feel welcome
- That is efficient and highly utilized
- That meets current industry standards
- That provides a high-quality acoustic environment for musical performances
- That can accommodate dance performances
- That will support the growth of local artists and presenters
- That will provide Londoners with the opportunity to taste and sample the wide array of live performing arts product that is available

SEE APPENDIX A.2 FOR A CHART OF CURRENT FACILITIES IN LONDON COMPARED WITH THE PROPOSED NEW FACILITY.

SEE APPENDIX A.3 FOR A LIST OF TOURING SHOWS NOT CURRENTLY COMING TO LONDON WHICH COULD BE ACCOMMODATED BY A NEW FACILITY.

4.2 Current Use of Centennial Hall and Options for Diversion of This Use

The City has asked whether the current users would go elsewhere and whether there is uptake potential in the existing venue inventory in London.

The three most frequent bookers of Centennial Hall are:

- Orchestra London
- Fanshawe Chorus London / Gerald Fagan Singers
- Don Jones Productions (facility operator)

As noted in the operations analysis which is contained in Appendix A.7 of this report, the theatrical usage of Centennial Hall has averaged 57 theatrical events (91 days) annually over the last three years.

About 55% of this usage is attributed to classical music, most of which is provided by Orchestra London. About 25% of this usage is pop music, much of which is provided by Don Jones Productions.

If Centennial Hall were not available, most of these uses would find some other venue. Given the amount of product to be housed, the challenge would not be insurmountable. Orchestra London has already diverted some concerts to Forest City Community Church and other churches. Pop music attractions always find other venues with act selection moving up or down market in relation to audience capacity.

Alternatively, a new, purpose built live performance venue should produce a substantial increase in presentations from existing users as the pattern associated with new facilities is increased interest by presenters and the public.

SEE APPENDIX A.7 FOR AN OPERATIONS ANALYSIS OF CENTENNIAL HALL.

4.3 Gaps in London Venues as Perceived by Respondents to the Study

During the course of the study, there were a number of recurrent themes expressed by respondents and participants in panel discussions including:

- Mid-sized Space: A hall with seating for a mid-sized audience (1,000-2,000 people range). London's venues are either very large (2,000-10,000 people range) or small (100-800 people range).
- Affordable Space: Reasonably priced rental space for community groups and mid-sized local arts organizations (e.g. student groups, ethnic community groups, dance studios, up-and-coming musicians, etc).
- Available Rental Space: A hall that has open booking times available for rental by community groups and mid-sized local arts organizations (e.g. it has regular performances by the orchestra but it does not have a "season" in the way that the Grand does or one exclusive priority user group, like Alumni Hall's Varsity sports teams).
- High Quality Acoustics: A venue with high quality acoustics for musical performances (there is a great need here expressed not only by the orchestra and local choral groups, but also by the faculty and students from the University of Western's renowned Faculty of Music and presenters who bring world-class musicians to London to perform). Currently, The University's Faculty of Music organizes field trips to other cities so that its students can hear themselves perform in a good acoustical

space.

- Suite of Rooms: There is a need for a performance venue with a suite of multi-purpose rooms that could be used as green rooms during dance competitions or school drama and music festivals, or that could be used for drama workshops or band clinics; these would support extensive and broad-based community use and would make the facility more accessible for educational programming and young audience development.
- Dance Performances: There is no venue that can adequately accommodate dance performances, aside, perhaps, from the Grand, which prioritizes repertory theatre and has few available booking times for other community groups. The John Labatt Centre is too expensive for many interested dance companies to rent, Alumni Hall is monopolized by Varsity athletes, Centennial Hall has no wing space and poor sightlines, and other theatres do not have a large enough audience capacity.

There is a lot of interest in dance in London that is currently not being met – studio rehearsal space in dance studios is fully booked up; there are around 20 dance studios in London who are desperate for affordable performance space in a venue with a large number of seats; and touring dance companies and competitions have expressed interest in the London market. (Touring dance competitions currently book Centennial Hall, but are dissatisfied with the space for the reasons discussed above.)

- “Festival” Marketing: There is a need for a venue that can be open all or most of the time, that can combine both indoor performances and outdoor performances, and perhaps become, like Toronto’s Harbourfront Centre, a multiple offering destination that provides a kind of “festival” throughout the year.

This “festival” type of atmosphere would encourage a broad community sense of ownership of the facility. First, because it would offer a variety of things to do, so it would appeal not only to a broad spectrum of the community, but it would also be more easily integrated into a day with a full schedule of activities.

Second, it would offer a low-pressure environment where people could feel comfortable simply showing up and participating without necessarily knowing what types of performances are on at a given time. This would foster a solid local audience from different ethnic and socio-economic backgrounds and appeal to the post-Boomer generation. It would remove some of the barriers to arts participation experienced most strongly by newcomers and younger people

Respondents and panel participants continually spoke about the perceived gaps in relation to city culture and civic life including:

- London needs to foster its cultural industries to encourage young people to stay in London to build their careers
- London needs to support its arts and cultural organizations to promote itself as a tourism destination
- Individual arts groups and their audiences tend to be siloed from one another. London needs a venue where all members of the community feel a sense of ownership and belonging
- London needs a facility to support the full range of educational and cultural programming
- London needs a venue that can act as an incubator for its young people's arts appreciation and talent
- London needs a venue that is specifically designed (in terms of acoustics, backstage space, etc) for musical and dance performances
- London needs a facility that can be used by broad sectors of the community, but which can also support touring groups

The response from the perspective of live performance disciplines included:

	Venues Available	What Is Not Available
MUSIC	<ul style="list-style-type: none"> • John Labatt Centre (2,800 - 10,000 seats) • Centennial Hall (1,637 seats) • Grand Theatre (839 seats) • Wolf Performance Hall (371 seats) • Aeolian Hall (300 seats) 	An affordable venue in the mid-size range (1000 - 2000) with excellent acoustics and sightlines, and a large stage, in the downtown core.
DANCE	<ul style="list-style-type: none"> • John Labatt Centre (2,800 - 10,000 seats) • Centennial Hall (1,637 seats) • Grand Theatre (839 seats) • Wolf Performance Hall (371 seats) 	An affordable venue with a sprung floor stage that can accommodate large dance corps backstage and large audiences (1000 - 2000). A venue that will seek out touring dance troupes and book them on a regular basis.
THEATRE	<ul style="list-style-type: none"> • RBC Theatre at the JLC (2,800 seats) • Centennial Hall (1,637 seats) • Grand Theatre (839 seats) • Wolf Performance Hall (371 seats) • Palace Theatre (357 seats) • Aeolian Hall (300 seats) • McManus Studio Theatre (150 seats) • The ARTS Project (100 seats) • Spriet Family Theatre (96 seats) 	Most types of spoken word and theatrical performance are accommodated by the variety of venues in London. Community theatre groups have a variety of small-scale and relatively affordable spaces to choose from. Larger-scale touring shows may book either at the Grand or at the JLC.

Note: Alumni Hall (2,300 seats) is rarely available for bookings, even by UWO student groups and performers, since it is used by UWO's Varsity athletes as an auditorium for basketball and volleyball practices and games. For this reason it has not been included on this list. Von Kuster Hall and Talbot Theatre are also on campus and are used almost exclusively by faculty and students.

FOR A MORE FULL DISCUSSION OF COMPETING AND COMPLEMENTARY VENUES IN LONDON, SEE APPENDIX A.4.

4.4 Summary of the Market Analysis

.1 General Market Profile of London

The Market Report establishes the context for the analysis of the performing arts market in London. It refers to national standards and benchmarks against which the London market can be seen. In addition to the resident population, it also describes the student and visitor market. Most important, it examines the impact of demographic change.

.2 Capacity and Demand – Facilities

The Market Report describes the facilities and venues through which the performing arts products reach their market. It identifies facilities which have been purposely built for performing arts, other assembly facilities (e.g., churches) which are occasionally used to deliver performing arts products as well as hospitality facilities, bars and nightclubs. This section differentiates between those facilities in the broader community and those at the University of Western Ontario.

.3 Capacity and Demand – Product and Audience

The Market Report also describes the performance of the market relative to its size. It indicates the potential for growth, the kinds of facilities required to support growth, and the broad strategic measures which are required to connect with a market in which there are many small niches. It concludes with recommendations on how to re-position Centennial Hall to play a role in market development.

.4 Operations Analysis

Section 6 of the report analyses the operation of Centennial Hall during the calendar years 2004 through 2006. This section identifies four broad categories of performing arts usage in this period. Comments are provided on the cost and benefit of the Centennial Hall operation.

The report concludes with a number of appendices containing tables and summaries of research into various aspects of the work.

4.5 Benchmark Facilities

No two performing arts facilities share accounting methods or reporting formats. It is therefore very difficult to make reliable comparisons.

Since it is virtually impossible to pinpoint one benchmark facility, three have been selected:

- The Francis Winspear Centre for Music (Edmonton)
- The Living Arts Centre (Mississauga)
- The Rose Theatre (Brampton)

Each of these facilities is located within a mid-sized Canadian city (400,000 to 800,000 people) and has an arena, a mid-sized performing arts venue, and a variety of active stage theatres. All were built within the last ten years and so are relatively new.

SEE APPENDIX A.5 FOR AN OVERVIEW OF CONTEXTUAL INFORMATION FOR THE BENCHMARK FACILITIES AND APPENDIX A.6 FOR BUILDING INFORMATION.

.1 Target Similarities and Key Differences

The Winspear Centre will be used as the basic target model, with additional information from the other two.

The key similarities and differences between the Winspear and the proposed new facility for London are:

	Target Similarities	Key Differences
DESIGN	Winspear has exceptional acoustics for musical performances (especially unamplified).	Winspear cannot accommodate dance performances; whereas this would be an essential component of a new facility.
	Winspear has exceptional acoustic separation between its four spaces: 1) The Performance Chamber, 2) the Studio Theatre, 3) the three Lobbies and the Telus Founders' Room, and 4) the Administration and Mechanical area.	Winspear is a concert hall – its stage platform is a solid floor in the same enclosure as the audience. The proposed new facility in London would be a lyric theatre, with a sprung-floor stage in a separate enclosure from the audience.
		Winspear's main Performance Chamber has 1,900 seats; the proposed new facility would have between 1,200 and 1,400.
FINANCE & OPERATIONS	Winspear operates at break-even or close to break-even by maximizing rentals of its facilities and maintaining an extremely high rate of utilization.	Winspear is run independently from the City with no municipal funding (although the governance model has not been determined for a new London facility, it is assumed that it will require some sort of arms-length relationship with the City and some municipal funding).
	Winspear has a suite of rooms and maximizes its utilization and revenues by promoting and renting out its secondary spaces as well as its main stage.	Winspear is primarily rented by touring companies; the proposed new London facility would have lower rates to accommodate more local usages.
PROGRAMMING	Winspear offers a wide variety of touring musicians, from Anne Murray to the Chinese Opera; from Gordon Lightfoot to the Nelly Furtado; from the Afro-Cuban Allstars to the Dixie Chicks.	Winspear was built with one user group in mind – the Edmonton Symphony Orchestra – and so it is limited in the types of events it can host. The proposed new facility in London would be designed to accommodate a variety of performance genres and user groups.

.2 Facility Usage: Event Days

The Operations Analysis in Appendix A.7 assesses the number of available "event days" in a given year as 286. This number subtracts key holidays, maintenance days, rehearsals, and set-up and set strike days from the total days in a year. The number remaining is the number of days in which the theatre may be programmed for public enjoyment.

All three benchmark facilities have a high rate of utilization: their main stage event days are all greater than 200, and the number of event days increases when secondary spaces are taken into account. Centennial Hall had 115 event days on its main stage over the 2005-2006 season, and its total including its lower level bookings was only 155 event days.

SEE APPENDIX A.7 FOR AN OPERATIONS ANALYSIS OF CENTENNIAL HALL.

SEE APPENDIX A.8 FOR BENCHMARK FACILITIES' EVENT DAYS IN COMPARISON WITH CENTENNIAL HALL.

.3 Facility Usage: Events and Rental Rates

Event days do not count the number of events taking place in a venue. Frequently, the number of days exceeds the number of events due to long runs of individual shows.

The Rose Theatre opened in September 2006 and has yet to complete its first season of programming; nevertheless, it has already achieved a high rate of utilization (see Appendix A.9 for a detailed breakdown of the Rose Theatre's usage). In comparison to Centennial Hall's 86 events on its upper level stage, the Rose has booked 161 events on its Main Stage. The Winspear hosted around 325 events in its Performance Chamber.

The Winspear's financial model requires a constant turn-around of shows. It cannot afford to rent its facilities for runs longer than 2 or 3 days, and most performances run for one night only. The Rose, on the other hand, is able to rent out its facilities for week-long performance runs and festivals.

For commercial use of its main Performance Chamber, the Winspear charges \$2,600 per performance or 10% of gross ticket sales, whichever is greater. For non-profit use of the Performance Chamber, the Winspear charges \$2,300 or 10% of ticket sales (capped at \$4,000) from Monday to Wednesday, and \$2,500 or 10% of ticket sales (capped at \$4,200) from Thursday through Sunday. Two performances in one day are 10% of ticket sales or \$3,800 for commercial users and \$3,000 for non-profit users, whichever is greater (capped at \$4,700 for non-profit users).

By contrast, the Rose Theatre charges commercial users \$1,500 and a further \$300 for each additional hour after the first five. Non-profit users are charged \$1,000 and a further \$200 for each additional hour after the first five. Community-affiliated groups are charged \$725 and a further \$145 for each additional hour after the first five.

SEE APPENDIX A.9 FOR A DETAILED BREAKDOWN OF THE ROSE THEATRE'S USAGE IN ITS FIRST YEAR OF OPERATION.

SEE APPENDIX A.10 FOR A TABLE OF FINANCIAL AND OPERATING INFORMATION FOR THE THREE BENCHMARK FACILITIES.

.4 Operating Costs and Municipal Funding

The Winspear is not owned by the City of Edmonton but by a non-profit, share-holding entity called the Edmonton Concert Hall Foundation. As such, the Winspear receives no municipal funding for its operations.

The Rose and the LAC are both municipally owned. The LAC is run by a Board of Directors which operates at arms-length from the City, while the Rose is operated as part of the City's Community Services department. The LAC receives an annual operating grant and the City additionally provides several services, including security, custodial work, HVAC maintenance, accounting, human resources, and IT assistance.

The Rose does not receive an operating grant; rather, the difference between its expenses and its revenues is covered by the City. In its first year of operation, the net cost to the City was \$1.5 million. The Winspear's deficit in its ninth year of operation (2006) was \$100,000. The 10-year-old LAC prefers to keep the details of its financial information confidential, but it operates at about break-even.

Based on survey of municipally-owned Ontario facilities in addition to these benchmark facilities, the net cost to the City in the first year of operation of the proposed new facility will be in the order of a \$500,000 operating grant accompanied by approximately \$1 million of in-kind services.

SEE APPENDIX A.10 FOR A TABLE OF FINANCIAL AND OPERATING INFORMATION ON THE THREE BENCHMARK FACILITIES.

SEE SECTION 7.6 OF THIS REPORT FOR A MORE DETAILED DISCUSSION OF OPERATING COSTS AND MUNICIPAL FUNDING FOR THE PROPOSED NEW FACILITY IN LONDON.

.5 Programming

Each of the three benchmark facilities discussed here has a mandate to maximize local participation. They have tiered rental rates that provide space at the lowest cost to non-profit community groups, at a higher cost to non-profit groups from outside the community, and at greatest cost to commercial groups.

The result is a high degree of community participation. One-third of the Winspear's Performance Chamber events are presented by the Edmonton Symphony Orchestra; bookings by other local groups raise this even higher. Over 42% of all events in the three theatres at the Living Arts Centre were put on by community-based organizations. At the Rose Theatre, 62% of all events in Theatre's three programmable spaces were locally-produced.

The trend is clear: the more municipal funding a facility receives, the more community participation increases.

High utilization depends not only on community participation, but also on maximizing the availability of touring product. The table attached as Appendix A.8 compares a sample of the offerings of the three benchmark facilities with those of Centennial Hall, highlighting the shows that are not performed anywhere in London.

The table attached as Appendix A.11 profiles a selection of mid-sized, municipally-owned performance halls in Ontario to show the variety of touring product they host. There is a significant degree of overlap in the shows offered by these facilities, but few of these shows come to London.

Appendix A.3 lists the attractions that are not currently coming to London, but which could play in mid-sized performance venue. Appendix A.12 gives a list of the programming potential for a new facility in London.

Where Appendix A.3 focuses on touring shows not currently in London, Appendix A.12 lists local performers along with touring shows both currently playing in London and currently missing in London. Where Appendix A.3 is focused exclusively on the current gaps in programming in London, Appendix A.12 is intended to give a broad overview of the programming potential of a new facility.

SEE APPENDIX A.8 FOR THE COMPARISON OF THE BENCHMARK FACILITIES' PROGRAMMING WITH THAT OF CENTENNIAL HALL.

FOR A SURVEY OF THE MARKET OFFERINGS AND SHOWS TOURING 1,000 TO 2,000-SEAT THEATRES IN ONTARIO, SEE APPENDIX A.11.

FOR A LIST OF ATTRACTIONS NOT CURRENTLY COMING TO LONDON, SEE APPENDIX A.3.

FOR A MORE COMPREHENSIVE OVERVIEW OF THE PROGRAMMING POTENTIAL FOR A NEW, MID-SIZED PERFORMANCE VENUE IN LONDON, SEE APPENDIX A.12.

4.6 Overview of Capital Development Options

This report concludes that London should seriously consider building a new facility on a new site. In making this case, all the potential development scenarios were compared as shown in the chart which follows.

Scenario 1: New Building on a New Site	
Scope of Work	Complete new construction
Rationale	Existing CH building has no value
Market Implications	Maximum exposure and benefit
Operational Implications	CH not closed during construction
Capital Cost Implications	Biggest investment/biggest return
Scheduling and Timetable	Begins once site is acquired

Scenario 2: Major Re-building on This Site	
Scope of Work	Retain basic structure only
Rationale	Save some costs (site, foundations)
Market Implications	Positioned as a new building
Operational Implications	CH closed during construction
Capital Cost Implications	Big investment/big return
Scheduling and Timetable	Design could begin immediately

Scenario 3: Renovation on This Site	
Scope of Work	Necessary improvements only
Rationale	Minimum investment/short term
Market Implications	May be perceived as same building
Operational Implications	CH partly closed during construction
Capital Cost Implications	Poor return on investment
Scheduling and Timetable	Could begin immediately and be phased

Scenario 4: Alternate Use of This Site	
Scope of Work	Demolition of Centennial Hall
Rationale	Replaced by new facility
Market Implications	Fresh start on a new site
Operational Implications	CH not closed during construction
Capital Cost Implications	None – demolition paid by new use
Scheduling and Timetable	Occurs when new facility opens

Scenario 5: Renovation of Other Existing Building	
Scope of Work	Major renovation of other existing building
Rationale	Existing CH building lesser value
Market Implications	High exposure and benefit
Operational Implications	CH not closed during construction
Capital Cost Implications	Big investment/big return
Scheduling and Timetable	No suitable building has been identified

5.0

BUILDING OPTION

5.0 BUILDING OPTION

5.1 Facility to Replace Centennial Hall

Section 2 of this document and the Building Condition Report prepared as an adjunct to this Feasibility Study contain an analysis of the existing Centennial Hall building. The outcome of this analysis is that Centennial Hall is so deficient both as a building and as a live performance venue that replacement of the facility is the only feasible option.

5.2 Goals for the Facility to Replace Centennial Hall

The planning process for a replacement facility begins with an acknowledgement of the broad goals which a new facility will serve, including:

- Support artists and works which address or reflect contemporary life in London
- Encourage a diversity of voices and forms of cultural expression
- Create synergies between artists, presenters, sponsors and audiences
- Foster a better understanding and appreciation of culture
- Reflect the richness and vibrancy of our cultural heritage to the widest possible audience
- Encourage the interaction between culture in London and elsewhere
- Provide exposure and access for Londoners to performances and artists from elsewhere
- Help realize the potential of new media and technology to extend the range of artistic expression and facilitate greater access to contemporary culture

5.3 Opportunities Presented by the New Facility

Guided by goals and objectives such as those described above, there are overriding opportunities which a new facility should seize.

.1 Re-connect the Missing Link

The position which Centennial Hall has occupied in the inventory of venues in London for the past 40 years is that of a mid-size rental facility which serves a wide range of presentations suitable to the economics of 1,600 seats.

While Centennial Hall is present as a physical site, it is nearly absent as a force in the entertainment and cultural life of the London community, as noted elsewhere in this report. Centennial Hall has not been fulfilling its role as London's premier mid-sized venue.

.2 Reflect Current Building Standards

Given the size and nature of the market and population base and the programming potential which this represents, this report takes the position that the poor performance of Centennial Hall in serving its community is directly related to its flawed design and poor condition. Audiences and presenters interviewed for this report were unanimous in their distaste for this building.

.3 Provide Opportunities for Local Cultural Development

There is also a strong argument to be made for the proposition that Centennial Hall's poor performance has stifled the development of local cultural products and audiences.

A new facility could provide redress for this condition through:

- Support of local producers of traditional art forms
- Support of new works in the arts
- Promotion of living and learning through the arts
- Promotion of cross-cultural programs and intercultural dialogue
- Promotion of festivals and showcasing in all art forms
- Promotion of recording and broadcasting in all arts forms

5.4 Facility to Support the Opportunities

As envisioned by those who were consulted, a new facility will be a significant and highly visible civic feature. As such, the facility will have a strong identity and it will be a destination in and of itself.

Interviewees also noted that the usage of the facility should also reflect the broad diversity of tastes and interests in greater London.

The facility is seen as a resource to all program providers in London and one which will be operated on a collaborative basis with other facilities in the city.

The facility must be a high quality venue reflecting the best traditions and current thinking in theatre design. The facility must be fully equipped to accommodate a wide range of uses including music, drama, dance, lectures and media-based presentations.

The theatre should seat between 1,200 and 1,500 spectators with some flexibility in the seating formats.

5.5 Criteria for the Facility to Replace Centennial Hall

These criteria for the development of a new facility have been drawn from:

- Comments made in interviews and meetings
- Implications of these comments
- The traditions and practices related to this building type

These criteria will provide the basis for both facility design and operations planning.

.1 Policy Criteria

- The facility will serve to advance London's cultural needs first
- The facility will be welcoming to the broader community
- The facility will be positioned as a draw which will help bring people to the central core
- The facility will be inclusive and respectful of the broad diversity of the city
- The facility will be managed and operated for the benefit of all
- The facility will support the mission and vision of the Creative Cities Task Force
- The facility will have a recognizable identity which is achieved through (i) a distinctive name and (ii) a strong visual and graphic presence

.2 Service Delivery Criteria

- The facility will serve as a centre of excellence and be a resource to all program providers in London
- The facility itself will not be a program provider except as required to provide a full range of programmatic options
- The facility will encourage a program mix which balances needs within the London artistic community and the broadest range of market interests
- The facility will be positioned as an event centre
- The facility will serve the performing arts and other assembly functions
- The facility will be a destination in and of itself

.3 Financial Criteria

- The facility will operate in a fiscally responsible manner
- The facility will be fully capitalized and will not carry any capital debt load
- The facility will be a separate business unit and will levy fees for its use
- The facility will be a "rental" facility and will not take risks
- The facility will have a tiered rate structure

- The facility will be financially accessible to local and community arts groups
- The facility will be booked through its own booking office ?

.4 Operating Criteria

- The facility will be managed in keeping with current industry standards for theatre management in Canada
- The facility will be managed and promoted to ensure a high level of utilization
- The facility will be a venue first, a cultural animator second and a program provider (if necessary) third
- The facility will accommodate touring attractions
- The facility will have operations and technical staff to support users

.5 Facility Design Criteria

- The facility will be designed to uphold the best traditions of this building type and to reflect the best current thinking in theatre design
- The facility will be designed to reflect the wide range of tastes and interests within the London market in regard to its image and presence
- Materials and finishes will be functional and simple with equal consideration for durability and high quality ?
- The facility will be constructed to have a 100 year service life
- The facility will have an excellent listening environment for both speech and music
- The facility will have some flexibility in its seating/staging formats with superior sightlines throughout
- The facility will have a full complement of spaces in its public areas and backstage to maximize local usages and community access
- The facility will be designed and equipped to support all performing arts uses – drama, dance, music, musical theatre, opera
- The facility will be designed and equipped to support film, video and digital media
- The facility will be wired for broadcast, webcast and recording
- The facility will be fully equipped to achieve maximal operating efficiencies and to appeal to the widest variety of users
- The facility will support professional artists and community participants equally
- The facility will have a spatial and functional relationship to other assembly facilities on site or nearby (practice rooms, classrooms, exhibit spaces, banquet facilities)
- The facility will be seniors friendly and totally accessible
- The facility will feel welcoming and accessible to all

5.6 Facility Design Options

.1 Basic Requirements

All options for design of the facility should:

- Fit a footprint of at least 50 meters by 75 metres
- Have a stage deck which is capable of supporting a range of uses from large orchestra ensembles to lyric theatre (opera, ballet, musicals) to headliners, lectures and media-based presentations

.2 Auditorium Options

The auditorium should be designed to serve varying sizes of audience with equal comfort.

This accommodation of different sizes of audience should be achieved through dividing the audience areas into "communities of seating." The design of the auditorium should include both a balcony and side galleries. The orchestra level of seating should be divided into terraces.

The auditorium should also be designed to achieve some flexibility in the staging formats.

This flexibility should be achieved through the re-arrangement of stage and seating components in the zone between the proscenium and the middle of the orchestra level seating. This re-arrangement should provide features such as a stage extension for large music ensembles and staging for events in-the-round.

.3 Stage Options

The stage may be equipped with a fly tower with a counterweighted rigging system which allows full-stage drops and curtains to be flown out of sight and a lower stage tower that is furnished with technical catwalks and a motor driven rigging system.

The stage should be provided with components to allow the facility to function as a concert venue for acoustic music including an orchestra shell, pit lifts and chairs wagons.

With such features, both the operators and the users of the facility should benefit from the ability to deliver professional quality presentation with efficient labour costs.

165
X
24

5.7 Preliminary Program of Functions and Spaces

.1 Public Spaces

The main entrance to the facility should be easily identified from the exterior approach.

The entry into the facility should be easily identified within the interior circulation scheme of the complex.

The facility's public spaces should be secure from other spaces in the complex.

The facility's public spaces should be self-contained with dedicated crush space, washrooms, coat check and refreshment areas.

The lobbies should be on two floors and should be internally connected.

The facility's public spaces should include a ticket outlet/information area and administration area.

.2 Stage and Auditorium

The auditorium should have an orchestra level and a balcony level.

The design of the auditorium should reflect a "communities of seating" approach, which allows larger and smaller audiences to be accommodated in the same space with equal comfort.

The design of the auditorium should allow for flexibility in the seating formats.

The stage should be designed to be large enough for a symphony orchestra and should be capable of being reduced for drama and dance and further reduced for lectures and media-based presentations.

The stage should include a forestage zone with orchestra pit below. The facility should have ample side stage areas to support dance presentations and presentations with movable scenery.

.3 Backstage and Support Spaces

The facility's backstage spaces should be a secure zone.

The backstage spaces should be designed to support touring attractions with easy loading, generous storage and efficient flow of goods and materials.

Backstage spaces should be provided for technical support personnel and for minor repair and maintenance of theatre equipment, scenery and costumes.

Backstage spaces should be provided for artists and production management staff. Dedicated dressing room accommodation should be provided for about 40 artists with capability of temporary expansion to chorus/warm-up room.

.4 Related Program Delivery Spaces

Other related multiple use spaces may be provided including rehearsal hall, dance, drama and music studios and lecture theatre and these should be contiguous with but separate from the backstage of the Theatre.

.5 Related Building Service Spaces

The facility should have a dedicated main electrical room which should feed both the building and theatrical systems.

The facility should have dedicated HVAC fan rooms, which should provide low velocity heating and cooling in multiple zones.

The facility should have custodial rooms to service both the public and backstage areas.

.2 Supplementary Spaces

The basic building described above includes a single program delivery space (auditorium).

From a wage perspective, it is desirable to have related programmatic spaces such as secondary halls and rehearsal halls which will contribute to the facility's market appeal. Such supplemental spaces will enjoy economies of scale by being connected to public and support spaces in the basic building.

The incremental area associated with, for example, two supplementary spaces totaling 10,000 SF of program delivery space would be:

	<u>SF</u>	<u>M2</u>
Public Space	5,000	450
Program Space	10,000	900
Support Space	5,000	450
Building Services	2,500	225
Sub-total (net area)	22,500	2,025
Grossing factor (x 1.4)		
Total (gross area)	31,500	2,835

.3 District Concept

Depending upon the site options which are available, there may be opportunities for developing critical mass through clustering of related uses resulting in an arts destination.

Also, depending upon sites, there may be opportunities to reuse existing buildings from these related functions or, ideally, for some of the space needs (public and support areas mostly) for the facility. Some savings will result but these savings will likely be relatively minor given the requirements of this building type.

5.8 Facility Area

.1 Basic Building

Based on the industry standards noted above, the major programmatic areas of the facility which would be a direct replacement for Centennial Hall may be in the order of:

	<u>SF</u>	<u>M2</u>
Public Space	22,500	2,200
Auditorium and Stage	20,500	1,950
Support Space	15,000	1,400
Building Services	5,000	450
Sub-total (net area)	63,000	6,000
Grossing factor (x 1.4)		
Total (gross area)	88,200	8,400

The area of the existing building, by comparison, is about 55,000 gsf.

6.0

IMPACT ON EXISTING FACILITIES IN LONDON

6.0 IMPACT ON EXISTING FACILITIES IN LONDON

APPENDIX A.4 CONTAINS A CHART OF COMPETING AND COMPLEMENTARY VENUES IN LONDON AND A BRIEF ANALYSIS OF THE IMPACT THE PROPOSED NEW FACILITY WOULD HAVE ON EACH ONE.

6.1 Impact on Facilities Seating Fewer than 500

The facilities in this category include:

Venues	Capacity
Talbot Theatre (University of Western Ontario campus)	375
Wolf Performance Hall (Downtown)	371
Palace Theatre (East Village)	357
Aeolian Hall (East Village)	300
Von Kuster Hall (University of Western Ontario campus)	248
McManus Studio Theatre (Downtown, in the Grand Theatre)	150
The ARTS Project (Downtown)	100
Spriet Family Theatre (Downtown, in Covent Garden Market)	96

The facility to replace Centennial Hall would have very little impact on small facilities in London. The shows that play in a venue with a capacity of 1,200 - 1,500 are rarely the types of shows that would play on smaller stages, certainly not in venues with a capacity of less than 500.

The Palace venue is a repertory theatre with a full slate of plays and musicals. The Spriet Family Theatre and McManus Studio Theatre focus almost exclusively on theatrical programming by and for young audiences. This is also a central part of Wolf Performance Hall's slate of events. The ARTS Project, through offering below-market rental rates and promotional support, provides a venue for emerging and experimental artists to mount a variety of shows.

The facility to replace Centennial Hall would focus on music concerts and dance performances, rather than spoken word, and would not present a challenge to the events offered by these facilities.

There will be some minimal overlap between the events programmed at the new facility and some of the events programmed at Wolf Performance Hall and Aeolian Hall.

Wolf Performance Hall offers some music and dance events in addition to its spoken-word programming. Aeolian Hall is at times rented by community theatre groups, but its primary

focus is on small scale musical programming, particularly of operatic, choral and orchestral music. The Hall is a showcase for both touring and local talent.

The overlap between these facilities and the new facility, however, is expected to be minimal. The new facility would offer a much larger space – both in terms of staging amenities and in terms of audience capacity – and would attract a different set of local and touring performers.

The two on-campus venues, the Talbot Theatre and von Kuster Hall, also provide musical programming, but are used almost exclusively by University of Western Ontario faculty and students and have little relationship to the wider community of performers and audiences. These two venues will not be affected by a new facility.

6.2 Impact on Facilities Seating More than 500 but Fewer than 1,000

The facilities in this category include:

Venue	Capacity
The Grand Theatre (Downtown)	839

The Grand Theatre is the only venue in London with a capacity greater than 500 but fewer than 1,000 seats. It is a playhouse style theatre that presents plays and musicals produced both locally and by touring companies. Its slate of events also includes some concerts by touring musicians, as well as an annual opera, and a ballet performance.

While there might be some overlap between the new facility's anticipated presentation of opera, ballet, and touring musical productions, the new facility would not impact the theatrical core programming of the Grand. Its presence would also free up space in the Grand Theatre's schedule. With a robust visioning and marketing strategy, these two facilities could not only complement each other but help each other's audiences grow.

6.3 Impact on Facilities Seating More than 1,000 but Fewer than 2,000

The facilities in this category include:

Venue	Capacity
Centennial Hall (Near downtown)	1,637

A new facility assumes Centennial Hall is taken off the market. At present, Centennial Hall is the only arts-focused facility in London with a seating capacity in this range. The proposed new facility would replace Centennial Hall with a similar seating in the range. It would accommodate the same types of artists and shows that Centennial Hall currently showcases, but would significantly expand the variety and number of performers.

6.4 Impact on Facilities Seating More than 2,000

The facilities in this category include:

Venues	Capacity
John Labatt Centre	2,800 - 10,000
Alumni Hall (University of Western Ontario campus)	2,300

The John Labatt Centre accommodates theatrical productions such as Broadway musicals in its RBC Theatre format which seats 2,800 people.

For hockey games and ice events, it seats 9,000 and for large concerts, its capacity increases to 10,000.

Local arts groups do not have access to the JLC because they cannot afford to rent performance space and they do not have suitable product. There would be little overlap between the JLC's slate of events and that of the new facility. The new facility would book musical performers and acts with mid-size audiences rather than arena size audiences. The new facility would also focus more on providing local artists with a venue.

Alumni Hall is used almost exclusively by Varsity basketball and volleyball player's practices and games. It is rarely available for bookings by community arts groups or even by other student groups. The new facility would have no impact on Alumni Hall as it is currently used.

6.5 Conclusion

There is a niche in the arts community for a mid-size venue with a focus on music and dance performances. The mid-range size of the venue would make it attractive to acts that fall somewhere between the Grand Theatre (839 seats) and the John Labatt Centre (2,800 - 10,000).

In terms of design, the new facility should be a lyric theatre (with a fly tower for optimal staging capacity, rather than a concert hall).

While there might be some overlap between the new facility's music and dance bookings and those of other local facilities, the general result will be that each venue will have its own niche better defined.

7.0

HOW TO GET THERE

7.0 HOW TO GET THERE

7.1 Costs

.1 Capital Cost Saving Strategies

Compared to most building types, performing arts facilities are costly to build. The cost premiums for this building type are principally in the volume-to-net-area ratio, the building envelope and structure, and the HVAC system. At the end of the day, the only effective way to reduce capital cost is to reduce the building area.

The building area is directly proportional to the occupancy load of program delivery spaces – area (and, to a lesser extent, volume) will be reduced as the seat count is reduced. Reduction of seat count will also affect the operating scenario, so a balance between capital cost and operations must be struck.

.2 Capital Cost Survey

Appendix A.13 of this report contains the results of a survey of the capital cost of various live performance facilities which have been built in the last few years in the southern Ontario construction market.

As noted earlier, it is almost impossible to gather sufficient evidence to make direct comparisons and to understand the variables. Three themes do, however, emerge.

As it is with most buildings, the cost varies with the amount of area built. (The cost of live performance facilities also varies in relation to the proportion of the building, which is made up of large volume space, versus the amount which is single storey.)

Second, live performance facilities are, comparatively speaking, more expensive buildings to construct than retail space or institutions such as schools or office buildings.

Third, large buildings need not be the most expensive on a square foot basis; witness the cost/sf of such buildings as the recently completed Four Seasons Opera House.

For the purposes of this report and on the basis of the survey, a reasonable construction cost range may be from \$400/sf to \$500/sf plus land and soft costs in today's dollars.

This would put the replacement of Centennial Hall at 84,000 gsf somewhere in the range of \$33 million to \$42 million in today's dollars. According to Hamscomb Cost Consultants, construction cost inflation is currently running at 4.5% per year.

SEE APPENDIX A.13 FOR A SURVEY OF CAPITAL COSTS FOR PERFORMANCE VENUES.

.3 LPAC Cost Analysis

A report commissioned by London Performing Arts Centre for a Concert Theatre in 2003 included a 2004 cost analysis by EllisDon Construction. This cost analysis showed two buildings:

- Base Building at 178,730 sf for \$97.2 million
- Reduced Base Building at 142,181 \$74.2 million

On this basis, the average cost on an area basis would be about \$535 per sf. This calculation would put the replacement of Centennial Hall at \$45 million based upon the areas noted above.

.4 Note to Readers

Any capital costs noted in this report are entirely speculative and relate only to a building which is a contemporary equivalent of Centennial Hall as described by the standards which are set out in this report. Costs will vary significantly based on the building program, building area, building site, project delivery and timing.

7.2 Locations

.1 Site Potential

The present site of Centennial Hall on Wellington Street, north of City Hall, is not recommended as a location for a new facility due to its limited size, its distance from the downtown core, its distance from synergistically related facilities like restaurants, and the limitations the underground parking garage places on development.

In the course of the study, the consultants determined that future facilities should be located in the ~~central core to take advantage of the related amenities and complementary facilities.~~

.2 Guiding Principles for Selecting a Location

- There will be no project until a site is acquired
- No site stands alone: all must be seen in context
- The site will affect the nature, form and scale of the project
- The site could be more than one property
- The site could have more than one owner (but only one developer)
- The site could contain existing buildings which are re-used
- Site development could be sequential (based upon a firm master plan)

7.3 Operating Analysis of Centennial Hall

An analysis of the current usage of Centennial Hall was carried out as part of the assessment process.

This analysis considered usage in relation to occupancy potential, usage in relation to similar facilities and cost/benefit.

.1 Occupancy and Facility Utilization

Based upon the last three years, Centennial Hall is used an average of 91 days per year for an average of 57 live performance events. This number represents about a third of utilization potential. The overall usage of the facility was about 50% of available time. This level of usage is well below the industry norm and it is a reflection more of facility management goals than market potential.

.2 Cost/Benefit

Over the past three years, the net cost to the City for Centennial Hall operations has been an average of about \$73,000. This net cost reflects the total use of the building, both as a banquet hall and as a performance venue. (The rest of the analysis in this report does not address the banquet hall function of Centennial Hall, at the request of the City.)

On the other hand, the cultural benefit in relation to the facility's potential has been extremely low.

FOR MORE INFORMATION RELATED TO THE FINDINGS OF THIS SECTION, PLEASE SEE APPENDIX A.7.

7.4 Operating Principles and Pro Forma

.1 Facility Ownership in Relation to Program Delivery

Subject to further discussion and investigation, the facility to replace Centennial Hall may be owned by the City of London or it could be owned by an arm's length non-profit corporation.

In either event, the owner will have title to the asset and will be ultimately responsible for fulfillment of the facility mandate and its financial operation.

While the owner is the operator of the building, the owner will be a facilitator of program delivery rather than a direct provider of programs.

.2 Facility Business Models

Given the intended user market, the goal will be to fully capitalize the building up-front so that rates reflect only operating and reserve account costs.

The facility to replace Centennial Hall will be operated on an industry standard "road-house" basis in which events are constantly turning over and users pay day rates.

.3 Facility Management Model

In addition to carrying out the mandate, the primary role of management will be to ensure that the facility achieves and maintains maximum utilization, that a mix of uses appropriate to cultural development is maintained and that occasional users are well serviced.

.4 Marketing and Program Delivery Model

Marketing and program delivery are two sides of the same coin.

This report proposes that the management will provide the marketing umbrella. Marketing by the management of all activities and events will be centralized and it will be funded out of rental/sales income (e.g., shopping centre or BIA marketing model.)

The management will have a facilitating role related to program coordination and program mix on the basis of an explicit policy developed by the community to ensure balanced cultural development.

The management will ensure that the facility's brand will appear consistently and continuously in the marketplace and will develop and execute policies related to events sponsorship.

Marketing by the management will have three goals:

- To create visibility and brand image for the facility in the marketplace
- To ensure a balanced program mix
- To coordinate and deliver marketing initiatives for themed programming at the facility
- To market individual events at the facility

It is assumed that the facility's marketing arm will be set up and fully funded to reach every segment and preference within the market electronically.

.5 Program Delivery and Program Partners

- A Composition of Arts Forms and Offerings

The program content in the facility will be wide ranging and include:

- Dance and ballet performances, recitals and concerts
- Dance instruction, practice and rehearsal
- Music (all forms) performances, recitals and concerts
- Music (all forms) instruction, practice and rehearsal
- New media/digital arts performances and presentations
- New media digital arts instruction and creation

.6 A Composition of Presenting Partners

The facility will be inclusive in its relations with Program Partners and will solicit, encourage and support Presenting Partners from all sectors of the community to ensure a balanced program mix which reflects the widest possible variety of tastes and interests in the community.

Program Partners will provide content and identifiable audience segments. Program Partners will also have their own organizational capacity, suppliers, sponsors and donors.

.7 The Facility Presents

In the early days of operations, the complement of Program Partners within the London market may not reflect the full range of the goals for community cultural development or potential programming opportunities.

If this were the case, the facility may become involved in direct presentation as a means of testing and developing a particular segment of the market which is deemed to be a missing programmatic link. Such initiatives would need to be separately funded as "R&D" and off-loaded once they either succeed or fail. The facility is otherwise not intended to be a presenting (i.e., risk-taking entity.)

SEE APPENDIX A.12 FOR A LIST OF TOURING AND LOCAL ACTS THAT COULD BE BOOKED IN THE PROPOSED NEW FACILITY.

7.5 Guiding Principles for Marketing and Program Delivery

This report takes the position that the consumer market in London (at roughly 500,000) persons has enormous untapped potential and that this potential will take three to five years to develop. The report also places heavy emphasis on the need to get market development going quickly in order to create a sustainable environment for the facility which will replace Centennial Hall.

Accordingly, this report recommends the adoption of the following market development principles:

- Treat program presenters as 1st tier clients
- Ensure participation by every presenter in the market
- Design annual programming with presenter involvement
- Package events into themes/festivals wherever possible
- Ensure that programming reflect the full range of available product
- Use short periods of high density rather than spreading out over a "season"
- Package to take advantage of all societal cycles (e.g., spring break)
- Ensure widest variety of interests served in any given year
- Create synergies of different activities in different spaces at the same time
- Look for non-traditional program connections (e.g., Starbucks)
- Facilitate social interaction in common and undedicated spaces
- Strive for learning opportunities (formal and self directed) in all programs
- Create specific links to educational institutions
- Develop specific focus on young people and new audience development
- Actively cooperate with complementary adjacent uses

7.6 Operating Budget Template

APPENDIX A.14 OF THIS REPORT CONTAINS A SAMPLE BUDGET TEMPLATE FOR THE REPLACEMENT FACILITY FOR CENTENNIAL HALL.

.1 Revenue Stream

The facility will generate revenues from the following sources:

- Facility rental fees
- Charge-backs on facility rentals
- Bars and concession sales
- Advertising and sponsorships
- Broadcast and media rights
- Grants and fundraising

The facility may also generate revenues from:

- Self-presentation ticket sales
- Endowment income

.2 Cost Stream

The facility will incur costs for building occupancy including:

- Capital reserves
- Cyclical maintenance
- Utilities and energy

The facility will incur costs for facility management including:

- Staffing and administration

The facility may also incur costs related to program delivery:

- Artist fees
- Sales and marketing

.3 Net Cost Survey

A recent survey by Novita estimated that the average net cost of operating smaller municipally owned live performance venues in Ontario is about \$325 per seat per year.

Most larger facilities in Ontario operate at a higher net cost although it is almost impossible to make reliable comparisons due to widely differing accounting formats and operating models. One facility profiled in this report as a benchmark venue, the Winspear in Edmonton, is not municipally owned and receives no operating subsidy from the City. It operates at break-even or near break-even (in the last fiscal year, expenses were \$4 million and revenues were \$3.9 million).

The Ontario facilities in the range of 1,000-2,000 seats which are profiled in Appendices A.10 and A.11) receive municipal grants in the order of \$500,000. In most cases, the City additionally provides some services to the facility; for example, accounting, security, human resources, custodial, and/or IT services. The annual cost of these services may be as high as \$1 million.

The key to responsible management of net cost lies in establishing a lean base cost structure and achieving the highest possible rate of utilization. High utilization will be achieved through a vision and mission for the facility which is focused on deep market penetration and a management which is mandated to accomplish this.

Determining the extent of the expenses which a new facility may incur and the extent of the additional services the City might provide in addition to its annual operating grant requires more detailed information than is currently available. For example, the site, the building type, the gross area, the mandate, and the management and governance structure, among others, will all factor into this equation.

However, it is possible to estimate in a preliminary way that the net cost to the City would be in the order of \$1.5 million in the first year of operation – a \$500,000 operating grant and approximately \$1 million worth of in-kind services.

.4 Sample Budget Format

While it is not possible to be predictive about operating costs without considerable more information than is currently available, Appendix A.14 contains a sample budget format which suggests that the annual gross cost of operating a facility to replace Centennial Hall would be in the range of ~~\$1.5 million.~~ - 2m

The net cost of operations would depend upon a wide range of variables which require further definition and testing as the project moves forward.

Appendix A.1

Contacts and Consultations

A.1 CONTACTS AND CONSULTATIONS

46 people and 30 organizations were contacted during the consultation process for this report.

City of London	
<ul style="list-style-type: none"> • Culture Office 	Robin Armistead, Manager of Culture and Municipal Policy Tel: (519) 661-2500, x5475 Email: rarmiste@london.ca
<ul style="list-style-type: none"> • Facilities 	Bill Campbell, Division Manager of Facilities Design and Construction Tel: (519) 661-2500, x4612 Email: bcampbel@london.ca
<ul style="list-style-type: none"> • Finance and Corporate Services 	Vic Cote, General Manager of Finance & Corporate Services Tel: (519) 661-2500, x4536 Email: vcote@london.ca
<ul style="list-style-type: none"> • Tourism London 	John Winston, General Manager and Mike Harris, Membership, Communications and Research Manager Tel: (519) 661-6396 Email: jwinston@london.ca Email: mharris@londontourism.ca
Arts Community	
<ul style="list-style-type: none"> • London Arts Council 	Andrea Halwa, Executive Director Tel: (519) 439-0013 Fax: (519) 439-0021 Email: ahalwa@londonarts.ca
<ul style="list-style-type: none"> • London Committee for Cross-Cultural Arts (SunFest Committee) 	Alfredo Caxaj, Chair and Artistic Director Tel: (519) 672-1522 Email: info@sunfest.on.ca
<ul style="list-style-type: none"> • London Performing Arts Centre 	John Kennedy, Director (Also a Director on the Board of Orchestra London and the London Arts Council) Tel: (519) 660-7836 Email: john.kennedy@siskinds.com

	<p>George Kerhoulas (Also member of Creative Cities Task Force, Chair of the Library Board, Vice President of & Commercial Sales Representative for Royal LePage Commercial Group) Tel: (519) 964-9000 Email: george.kerhoulas@ca.cushwake.com</p>
	<p>Michelle Quintyn (Also President of Orchestra London Board and President and CEO of Goodwill Industries, Ontario Great Lakes) Tel: (519) 645-1455, x235 Email: mquintyn@goodwillindustries.ca</p>
University of Western Ontario	
<ul style="list-style-type: none"> • Music 	<p>Robert W. Wood, Dean of the Don Wright Faculty of Music Tel: (519) 661-4008, x84008 Fax: (519) 661-3531 Email: rwood@uwo.ca</p>
	<p>Louis D'Alton, Concert Manager, Faculty of Music, Media Relations Office Tel: (519) 661-2111, x83019 Fax: (519) 661-3531 Email: ljdalton@uwo.ca</p>
<ul style="list-style-type: none"> • Entertainment and Events 	<p>Mark Wellington, Manager of Entertainment Productions Tel: (519) 661-4110, x84110 Email: mwelling@uwo.ca</p>
Fanshawe College	
<ul style="list-style-type: none"> • Faculty of Arts, Media, and Design 	<p>Greg Murphy, Chair of Contemporary Media Tel: (519) 452-4430, x4818 Email: gmurphy@fanshawec.ca</p>
Schools and Boards of Education	
<ul style="list-style-type: none"> • Central Secondary School 	<p>Carolyn May, Principal Tel: (519) 452-2630 Fax: (519) 452-2639 Email: c.may@tvdsb.on.ca</p>
	<p>Ann MacMillan, Head of Drama Email: a.Macmillan@tvdsb.on.ca</p>
	<p>Linda Wharton, Head of Music Email: lindawharton76@rogers.com</p>
<ul style="list-style-type: none"> • Thames Valley District School Board (TVDSB) 	<p>Bill Bryce, Director Tel: (519) 452-2000</p>

	Email: b.bryce@tvdsb.on.ca Nancy Lizmore, Learning Coordinator Tel: (519) 452-2000, x20394 Fax: (519) 452-2329 Email: n.lizmore@tvdsb.on.ca
<ul style="list-style-type: none"> London District Catholic School Board (LDCSB) 	Corrie Gicante, Acting Director Tel: (519) 663-2088 Email: c.gicante@ldcsb.on.ca Mary Holmes, Coordinator of Modern Languages and the Arts Email: m.holmes@ldcsb.on.ca
Local Live Performance Venues	
<ul style="list-style-type: none"> Centennial Hall 	Brad Jones, Manager and Promoter Tel: (519) 672-1967 Email: brad@donjonesproductions.com Greg Jones, Booking Manager Tel: (519) 672-1967
<ul style="list-style-type: none"> Grand Theatre 	Deb Harvey, Executive Director Tel: (519) 672-9030, x253 Email: dharvey@grandtheatre.com
<ul style="list-style-type: none"> John Labatt Centre 	Brian Ohi, General Manager Tel: (519) 667-5700
<ul style="list-style-type: none"> Library / Wolf Hall 	Margaret Mitchell, Head Librarian Tel: (519) 661-4600 Fax: (519) 633-9013 Email: margaret.mitchell@lpl.london.on.ca Julie Brandl, Coordinator of Children and Youth Services Email: julie.brandl@lpl.london.on.ca Lindsay Sage, Director of Marketing and Development Email: lindsay.sage@lpl.london.on.ca
Local Presenters	
<ul style="list-style-type: none"> Dance Extreme 	Rebecca Brettingham, Artistic Director Tel: (519) 657-3262 Fax: (519) 657-8680 Email: info@danceextreme.com
<ul style="list-style-type: none"> Fanshawe Chorus London 	Gerald Fagan, Artistic Director Marlene Fagan, General Manager Tel: (519) 433-9650

	Fax: (519) 672-2208 Email: info@lfscgfs.com
<ul style="list-style-type: none"> London International Children's Festival 	Suzi LaPorta, Children's Festival Coordinator Tel: (519) 645-6739 Email: suzi.laporta@londonchildfest.com OR laporta1@hotmail.com
<ul style="list-style-type: none"> Orchestra London 	Rob Gloor, Executive Director Tel: (519) 679-8558, x227 Fax: (519) 679-8914 Email: rgloor@orchestralondon.ca
Live Performance Venues in Other Ontario Cities	
<ul style="list-style-type: none"> Centre for the Arts, Brock University, St. Catharines 	Deb Slade, Director Telephone: (905) 688-5550, x3217 Fax: (905) 688-9451 Email: dslade@brocku.ca
<ul style="list-style-type: none"> Living Arts Centre, Mississauga 	Danna Evans, Manager, Performing Arts Tel: (905) 306-6193 Email: danna.evans@livingarts.on.ca
<ul style="list-style-type: none"> Centre in the Square, Kitchener 	Brenda Asselstine, Executive Assistant / Booking and Events Coordinator Tel: (519) 578-5660, x215 Email: basselstine@centre-square.com
<ul style="list-style-type: none"> Rose Theatre, Brampton 	Steve Solski, Manager of Arts, Culture and Theatre for the City of Brampton, Community Services Dept. Tel: (905) 874-2844, x2808 Email: steve.solski@brampton.ca
<ul style="list-style-type: none"> Francis Winspear Centre for Music, Edmonton 	Peter Gerrie, General Manager Tel: (780) 401-2513 Email: peter.gerrie@winspearcentre.com
Building Experts	
<ul style="list-style-type: none"> Chorley & Bisset: Mechanical and Electrical Consulting Engineers 	Peter Golem, Vice President Tel: (519) 679-8660 Fax: (519) 679-2145
	Bob Gordon, Director and Senior Engineer Tel: (519) 679-8660 Fax: (519) 679-2145
<ul style="list-style-type: none"> Hastings & Aziz Consulting: Structural Engineers 	Ted Aziz, Chief Executive Officer Telephone: (519) 439-0161 Email: ted.aziz@haeng.com

<ul style="list-style-type: none"> Novita Techne: Theatre and AV Consultants 	<p>David Jolliffe, Vice President and Manager of Technical Services Tel: (416) 761-9622, x23 Email: davidj@novita.on.ca</p>
Other Key Informants	
<ul style="list-style-type: none"> Canadian Tourism Research Institute (CTRI) 	<p>Greg Hermus, Associate Director Tel: (613) 526-3090, x244 Email: hermus@conferenceboard.ca</p>
<ul style="list-style-type: none"> Fred J. Schulz Consulting 	<p>Fred Schulz, Programming Consultant Tel: (705) 687-8426 Email: fjschulz@cogeco.ca</p>
<ul style="list-style-type: none"> Ontario Ministry of Tourism and Recreation 	<p>Alex Athanassakof, Manager of Research Tel: (416) 314-7317</p>
<ul style="list-style-type: none"> Pannel Kerr Forster (PKF) Consulting 	<p>Fran Hohol, Principal Tel: 416-360-5000, x12 Email: fran Hohol@pkfcanada.com</p>
<ul style="list-style-type: none"> Individual 	<p>Catherine Charlton, Fundraising Consultant & local PAC advocate Tel: (519) 438-5763 Email: crcjhy@sympatico.ca</p>

Repeated (but unsuccessful) efforts were made to contact and meet with:

- Clark Bryan, Aeolian Hall
- John Dolan, Coordinator of the Theatre Arts Program at Fanshawe College
- Dale Hirlehey, Artistic Director of the Original Kids Theatre Company at the Spriet Family Theatre in Covent Garden Market
- Mary Williamson, Cross-Cultural Learners' Centre
- Representatives of the Kiwanis Music Festival in London

• *Anabelle Choir* -

• *Opera.*

30,500

- COC - 1.2 - 2m - Seating is what.

Appendix A.2

Continuum of Live Performance Venues in London

FACILITY	JLC Arena & Concert Format	JLC Theatre Format	UWO ALUMNI HALL	CENTENNIAL HALL	REPLACEMENT FOR CENTENNIAL HALL	GRAND THEATRE	WOLF HALL	AEOLIAN HALL
Recent Touring Shows	<ul style="list-style-type: none"> * OHL Play-off Games * Il Divo * HSBBC's Stars on Ice * Harlem Globetrotters * John Mayer * Gaither Homecoming Concert * Rod Stewart * My Chemical Romance and the Black Parade * 2007 FivB Worldleague Volleyball * WWE Smackdown * Gwen Stefani 	<ul style="list-style-type: none"> * Broadway in London: The Producers * Broadway in London: Joseph and the Amazing Technicolor Dreamcoat * Harry Connick Jr. * Jann Arden * Broadway in London: Hairspray 	<p>N/A</p> <p>No touring shows have played here recently.</p>	<ul style="list-style-type: none"> * Stuart McLean * Holly Cole * John McDermott * Franklin the Turtle * Eva Avila * Colin James * Underoath and Armor for Sleep * John Tesh * Heart to Heart with Rick Mercer * Ontario Bodybuilding & Fitness Championships 	<p>Please see Appendices A.3 and A.X for more detailed listings. The following is a sample:</p> <ul style="list-style-type: none"> * Amazing Kreskin * Arrogant Worms * Blue Man Group * Colin Mochrie * Feist * K'Naan * Robert Munsch * WAI 100% (Maori music) * Ilstyle & Peace Productions (hip-hop dance) * Royal Winnipeg Ballet 	<ul style="list-style-type: none"> * Ballet Jørgen Canada: Romeo & Juliet * Women Fully Clothed Comedy Troupe * Orchestra London and Pacific Opera Victoria: Don Giovanni 	<ul style="list-style-type: none"> * London Reads Presents: David Bergen * Marina De Conceirto De Bellas Artes De Guatemala * Sandra Davis Buechner: Serenata Music * Spirit Horse by Roseneath Theatre * Fizzical Fizzicks 	<ul style="list-style-type: none"> * Cape Breton Live on Tour * Matt Mays * Fred Eaglesmith Band * Light of the East Ensemble: East Meets West * DK Ibomeka

**A.2 CONTINUUM OF LIVE PERFORMANCE FACILITIES IN LONDON
 (Including the Proposed Replacement for Centennial Hall)**

FACILITY	JLC Arena & Concert Format	JLC Theatre Format	UWO ALUMNI HALL	CENTENNIAL HALL	REPLACEMENT FOR CENTENNIAL HALL	GRAND THEATRE	WOLF HALL	AEOLIAN HALL
Seating Capacity	10,000	2,800	2,300	1,637	1,200 - 1,400	839	371	300
Type of Building	Arena	Arena	Convocation Hall	Concert Hall	Lyric Theatre	Playhouse	Recital Hall	Flat Floor Hall
Typical Uses	* Touring celebrity musicians (rock, pop, Celtic) * OHL hockey games * Other sports shows (e.g. volleyball, wrestling, basketball, etc) * Ice shows * Monster truck and car rallies	* Touring Broadway musicals * Touring celebrity musicians (rock, pop, Celtic) * Celebrity lecturers * Children's entertainers	* Varsity sports games and practices (volleyball and basketball) * University of Western Ontario Symphony Orchestra (2- 3 concerts / year)	* Headliners * Variety * Acoustic and reinforced music * Comedy * Dance competitions * Festivals * Bodybuilding championships * Private functions (meetings, weddings, fundraisers, school graduations; parties)	* Headliners * Variety * Acoustic music concerts * Reinforced music concerts * Dance recitals, competitions, and performances * Comedy * Music theatre * Festivals * Non- headline events	* Repertory theatre and musicals with some touring shows * Opera * Dance (ballet - touring) * Concerts (pop, rock, soul, blues, tribute bands, orchestra) * Weddings, AGMs, office parties, & other functions	* Spoken- word (plays, readings, lectures, panel discussions, author readings & signings) * Music (brass ensembles, jazz, orchestra, choirs, world music) * Films * Dance (classical and modern Indian dancers - local) * Focus on youth programming	* Local & touring musicians (blues, folk, country, classical, chamber, choral, orchestral, operatic, world music) * Community theatre * Educational and youth programming

Appendix A.3

Attractions Missing in London

A.3 ATTRACTIONS MISSING IN LONDON

The following is a list of touring attractions that are not currently coming to London, but which could be accommodated by a venue in the 1,200- to 1,400-seat range.

	Rock, Pop, Folk, Country, Hip-Hop	Blues, Jazz, Roots, World	Classical	Dance	Other
Artists and Headliners					
Abbamania	X				
Absolutely Sinatra	X				
Alannah Miles	X				
Amazing Kreskin					X
Amstel Quartet			X		
Amy Skye & Marc Jordan	X				
Andrew Weill					X
Angela Hewitt			X		
Ani di Franco	X				
Arrogant Worms	X	X			X
Barrage		X		X	
Ben Hepner			X		
Blackie & the Rodeo Kings	X				
Blue Man Group				X	
Blue Rodeo	X				
Branford Marsalis		X			
Broken Social Scene	X				
Buckwheat Zydeco (Creole party music)	X	X			
Buena Vista Social Club Members		X			
Burton Cummings	X				
Canadian Opera Company Ensemble			X		
Carole Welsman		X			
Carlos del Junco		X			
Celtic Women		X			
Cesaria Evora			X		
Charlie Pride	X				
Colin Mochrie and Brad Sherwood					X
Dancemakers				X	
Dave and Ian Thomas					X
Dave Brubeck Quartet		X			
David Clayton Thomas	X	X			
David Jaillbert			X		
David Wilcox	X				

	Rock, Pop, Folk, Country, Hip-Hop	Blues, Jazz, Roots, World	Classical	Dance	Other
Artists and Headliners					
Deborah Voigt			X		
Decidedly Jazz Danceworks				X	
Deepak Chopra				X	
Deepti Gupta			X		
Derek Edwards					X
Elmer Eisler Singers			X		
Emerson String Quartet			X		
Esprit Orchestra			X		
Eric Nagler		X			
Evelyn Glennie (Solo percussionist)	X	X			
Evil Dead: The Musical					X
Extreme Magic: International Stars of Illusion					X
Feist	X				
Gordon Lightfoot		X			
Great Big Sea	X				
Hannaford Street Silver Band		X			
Holy Body Tattoo				X	
Honeymoon Suite	X				
Ian McEwan					X
Illstyle & Peace Productions				X	
India.Arie	X				
Jackie Richardson		X			
Jamye Stone		X			
Jane Bunnett		X			
Jean-Luc Ponty		X			
Jeff Healey and the Jazz Wizards		X			
Jeri Brown		X			
Jerry White and His Gentlemen of Swing		X			
Jersey Boys					X
Jesse Cook		X	X		
Joan Armatrading	X				
John Fogarty	X				
Judy and David's Boom Box					X
Julie Doiron	X	X			
K'Naan	X				
Keith Jarrett		X			
Kim Mitchell	X				

	Rock, Pop, Folk, Country, Hip-Hop	Blues, Jazz, Roots, World	Classical	Dance	Other
Artists and Headliners					
Leonard Cohen		X			
Liona Boyd			X		
Leahy	X	X			
Les Grands Ballets Canadiens				X	
Loreena McKennitt		X	X		
Los Lobos	X	X			
Mad Science					X
Madeleine Payroux and Leon Redbone	X				
Maria Muldaur	X				
Matt Dusk		X			
Michael Schade			X		
Michelle Wright	X				
Momix				X	
Natalie MacMaster and Friends		X			
Nathaniel Dett Chorale		X			
National Ballet of Canada Ensemble		X			
Nickelback	X				
New Shanghai Circus featuring the Incredible Acrobats of China					X
Nnenna Freelon (Billie Holliday tribute)		X			
Noam Chomsky					X
Opera Atelier			X		
Opera Ontario					
Page France	X				
Pamina String Quarter		X			
Paul Taylor Dance Company			X		
Pilobolus				X	
Polyjesters	X	X			X
Quarteto Gelatto	X				
Rajaton (6-person Finnish a cappella group)		X	X		
Randy Bachman	X				
Ray Price	X				
Ricardo Lemvo and Makina Loca		X			
Riverdance		X		X	
Robert Munsch					X
Robert Michaels		X			
Roger Waters	X				
Roxanne Potvin		X			

	Rock, Pop, Folk, Country, Hip-Hop	Blues, Jazz, Roots, World	Classical	Dance	Other
Artists and Headliners					
Royal Winnipeg Ballet			X		
Sarah Harmer	X	X			
Saramabalouf		X			
Scotland The Brave		X		X	X
Scrap Arts	X			X	
Second City					X
Sinfonia Toronto			X		
Sophie Milman		X			
Sloan	X				
Stephen Kabakos (Elvis impersonator)	X				X
Sonny Rollins		X			
Steve Reich			X		
Tafelmusik			X		
Tartan Terrors		X		X	X
The Frantics					X
The Funk Brothers	X	X			
The Gryphon Trio			X		
The Irish Descendents	X	X			
The Laws	X				
The Meridian Trio			X		
The Nylons	X	X	X		
The Stills	X				
Tommy Hunter	X				
Tori Amos	X				
Toronto Dance Theatre				X	
Toronto Symphony Ensemble			X		
Tribute to Oscar Peterson		X			
Valdy		X			
Vida!				X	
Voices of Showtime with Peter Appleyard		X			
Von Trapp Children in Concert	X				X
WAI 100% (Maori)		X			X
Weird Al Yancovic	X				
Winton Marsalis		X			
Wolf Parade	X				
Yamato (Japanese drumming)		X			
Yo Yo Ma			X		

	Rock, Pop, Folk, Country, Hip-Hop	Blues, Jazz, Roots, World	Classical	Dance	Other
Artists and Headliners					
Festival Type Events					
Awards Shows					X
Celebrities Dance				X	
Christian Music Festival	X				
Fashion Cares					X
Film Festivals and Classic or Repertory Film Series					x
Fringe Festival					X
Gala Screenings					X
Great Composers (Bach, Beethoven, Brahms, etc)			X		
Indie Bands	X	X			
Light Operas/Chamber Operas			X		
"Live From..."					X
Pride Festival					X
Rising Stars	X	X	X	X	X
School Board Festivals (e.g. Sears Drama Festival, Choral Festival, Dance and Gymnastic Festival, Kiwanis Music Festival)	X	X	X	X	X
"Three Tenors"			X		

Appendix A.4

Competing and Complementary Facilities in London

A.4 COMPETING AND COMPLEMENTARY VENUES IN LONDON

Venue	Types of Performance	Rental Availability	Relationship to Proposed New Facility
John Labatt Centre 2,800 - 10,000 seats	*Touring celebrity musicians (rock, pop, Celtic) and entertainers (children's performers, Broadway shows, lecturers)	Many bookings at the JLC are sports events, ice shows, etc; the theatre format is not always available. Further, rental costs are too prohibitive for community arts groups. The JLC is primarily booked by touring celebrity headliners.	The new facility would not be able to host the same types of shows as the JLC – e.g. the major celebrity acts with stadium-capacity crowds – but would provide a venue with excellent quality acoustics for local and touring musical acts with mid-size audiences.
Grand Theatre 839 seats	* Repertory theatre and musicals with some touring shows * Opera * Dance (ballet – touring) * Concerts (pop, rock, soul, blues, tribute bands, orchestra) * Weddings, AGMs, office parties, & other functions	Available for rental, but a full season of shows makes it difficult for community arts groups to book time.	The Grand is primarily a repertory theatre which showcases drama, comedy, and musical theatre shows by both local and touring groups. While a new facility would compete with the Grand for ballet, opera, orchestra, and pop concert bookings, it would not infringe on the Grand's bread-and-butter offerings.
Wolf Performance Hall (in Central Library) 371 seats	* Spoken-word (plays, play-readings, lectures, panel discussions, author readings & signings) * Music (brass ensembles, jazz, orchestra, choirs, world music) * Films * Dance (classical and modern Indian dancers – local) * Focus on youth programming	Accessible for rental by community members and arts groups.	Wolf Hall is acoustically well-equipped for small theatrical and musical performances, but its small space limits the range of shows it can offer. Wolf Hall serves as an incubator for young people's talent in London and would complement a new facility.
Palace Theatre	* Repertory community theatre and musicals * Fundraisers and benefits	Accessible for rental by community members and arts groups.	The Palace Theatre is primarily a theatrical facility, though the venue may be rented for a variety of other

357 seats		The theatre is owned and programmed by the London Community Players and is leased by Musical Theatre Productions for its full slate of shows.	types of shows, functions, and gala events. Since the proposed new facility would not focus on theatrical presentations, there should not be a conflict.
Aeolian Hall 300 seats	<ul style="list-style-type: none"> * Local & touring musicians (blues, folk, country, classical, chamber, choral, orchestral, operatic, world music) * Community theatre * Educational and youth programming 	Accessible for rental by community members and arts groups.	There is some overlap between the types of music showcased by the Aeolian Hall (especially its presentation of operatic and orchestral music, performed by both touring and local artists). However, the new facility would provide a space for shows that require larger stage space and audience capacity.
McManus Studio Theatre (in Grand Theatre) 150 seats	<ul style="list-style-type: none"> * Focus on youth programming, high school theatre productions and children's entertainers * Smaller-scale performances and one-person shows * Staged readings * Parties 	Accessible for rental by community members and arts groups.	The McManus Studio Theatre is well-equipped for small theatrical and musical performances, but its small space limits the range of shows it can offer. It serves as an incubator for young people's talent in London and would complement a new facility.
The ARTS Project 100 seats	<ul style="list-style-type: none"> * Experimental and locally-written plays and productions * Small concerts * Literary readings * Films * Workshops and rehearsals * Sketch comedy 	Very affordable at below-market rates and accessible for rental by community members and arts groups; however, high demand makes booking peak times (evenings and weekends) difficult.	The ARTS Project provides much needed support to emerging and experimental artists. It serves as an incubator for talent in London and would complement a new facility.
Spriet Family Theatre (in Covent Garden Market) 96 seats	* Focus on young people's theatre	The theatre is the home of the Original Kids Theatre Company.	The Spriet Family Theatre focuses on small-scale children's programming. It serves as an incubator for young people's talent in London and would complement a new facility.

Appendix A.5

Benchmark Facilities: Location and Contextual Information

A.5 BENCHMARK FACILITIES: LOCATION AND CONTEXTUAL INFORMATION

		Venues and Seat Count*	
		Theatres	Mid-Sized Performance Halls
Edmonton, Alberta Population: 1,034,945		<p><u>Myer Horowitz Theatre (U of A)</u> * 720</p> <p><u>Eva O. Howard Theatre</u> * 697</p> <p><u>The Citadel Theatre</u> * MacIab Theatre: 686 * Shoctor Theatre: 685 * Zeldler Hall: 240 * Rice Theatre: 216 * Tucker Amphitheatre: 175 * Multipurpose Room A: 100 * Multipurpose Room B: 100</p>	<p><u>John L. Haar Theatre</u> * 349</p> <p><u>Timms Centre for the Arts (UofA)</u> * Main Stage: 321 * Second Space: 200 * Lobby: 80-135 * Plaza: 150-300</p> <p><u>The Roxy Theatre</u> * 188</p> <p><u>New Varscona Theatre</u> * 170</p> <p><u>Waiterdale Playhouse</u> * 145</p>
		<p><u>Meadowdale Theatre</u> * 683</p> <p><u>German Canadian Club Hansa</u> * 350</p> <p><u>Stage West Dinner Theatre</u> * 265</p> <p><u>Burmhamthorpe Library Theatre</u> * 201</p>	<p>Francis Winspear Centre for Music * Performance Chamber: 1,932 * Telus Studio Theatre: 240 * Founders' Room: 60 * Lobbies (3): 175-350</p> <p><u>Northern Alberta Jubilee Auditorium</u> * Auditorium: 2,538 * Rehearsal Hall * Banquet Room: 160 * Lobbies: 750</p>
Mississauga, Ontario Population: 668,549		<p><u>Palace Theatre</u> * 357</p> <p><u>Aeolian Hall</u> * 300</p> <p><u>The Arts Project</u> * 100</p> <p><u>Spirit Family Theatre</u> * 96</p>	<p>Living Arts Centre * Hammerson Hall: 1,315 * RBC Theatre: 310 seats</p> <p>* Rogers Theatre: 110 seats * Laidlaw Hall exhibition gallery * 7 Arts and crafts studios * 8 Meeting rooms * LIVE Cuisine Restaurant * SmartCentres Atrium and lobby: 350 * Galleria flexible open air space</p>
		<p><u>Grand Theatre</u> * Main Stage: 839 * McManus Studio Theatre: 150</p> <p><u>Talbot Theatre (UWO)</u> * 375</p> <p><u>Wolf Performance Hall</u> * 371</p>	<p>Hershey Centre * 6,000</p>
London, Ontario Population: 457,720		<p><u>Heritage Theatre</u> * 550</p> <p><u>Lester B. Pearson Theatre</u> * 460</p>	<p>Centennial Hall * Upper Level: 1,637 * Lower Level: 600</p> <p><u>Alumni Hall (UWO)</u> * 2,300</p>
		<p><u>John Labatt Centre</u> * 9,000</p>	<p>John Labatt Centre * 9,000</p>
Brampton, Ontario Population: 433,806		<p><u>Rose Theatre</u> * Main Stage: 880 * Secondary Hall: 160 * Garden Square (outdoors)</p>	<p>Rose Theatre * Main Stage: 880 * Secondary Hall: 160 * Garden Square (outdoors)</p>
		<p><u>Powerade Centre</u> * 4,980</p>	<p>Powerade Centre * 4,980</p>

This table accounts for the number of fixed seats or theatre-style seating arrangements, not the total reception capacity the venues listed.

Appendix A.6

Benchmark Facilities: Building Information

A.6 BENCHMARK FACILITIES: BUILDING INFORMATION

	WINSPEAR CENTRE	LIVING ARTS CENTRE	ROSE THEATRE
Location	Edmonton, Alberta (Pop: 1,034,945)	Mississauga, Ontario (Pop: 668,549)	Brampton, Ontario (Pop: 433,806)
Opening Date	September 1997	October 1997	September 2006
Cost to Build	\$ 40 million	\$68 million	\$51.6 million
Size	65,000 square feet	225,000 square feet	64,000 square feet
Ownership	Edmonton Concert Hall Foundation	City of Mississauga	City of Brampton
Governance	A non-profit organization with an 8-person Board of Directors and the Edmonton Symphony Orchestra as the exclusive share-holder	Registered not-for-profit organization, governed by an 18-member community-based Board of Directors	The theatre is part of the Arts, Culture and Theatre Section of the Community Services Department of the City of Brampton
Main Stage	Performance Chamber	Hammerson Hall	Main Stage
Seat Count	1,932	1,315	880
Type	Concert Hall designed in the classic 19 th century rectangular form	Lyric Theatre with proscenium. The shell is created by moving the required number of concert towers into position. The orchestra pit can accommodate 80 musicians.	Large playhouse. Proscenium theatre with an orchestra pit and a 10-storey fly tower.
Other Programmable Areas	1) Studio Theatre (formerly the Rehearsal Hall) (240 seats) 2) Telus Founders' Room (60 seats); 3-5) Three lobbies (175-350)	1) RBC Theatre (310 seats) 2) Rogers Theatre (110 seats) 3) Laidlaw Hall exhibition gallery 4-10) Seven arts and crafts studios 11-18) Eight meeting rooms 19) LIVE Cuisine Restaurant 20) SmartCentres Atrium and lobby (up to 350) 21) Galleria flexible open air space	1) Studio Theatre multipurpose space (160 seats) 2) A spacious, two-level lobby 3) A public square outside the building

N/A = information not available

Appendix A.7

Analysis of Centennial Hall Operations

A.7 ANALYSIS OF CENTENNIAL HALL OPERATIONS

1.1 Calculation of Facility Utilization

In order to offset annual fixed operating costs, owners strive to ensure that facilities are used as intensively as possible.

The calculation of available "event days" for a typical performing arts facility (road house) is based on the calendar year less key holidays and downtime.

Total Annual Days	365
Less key holidays (5)	360
Less monthly maintenance (12)	348
Less annual maintenance cycle (14)	334
Less set-up and rehearsal (4/month)	286
Total Possible Event Days	286

Under this calculation, a facility would achieve 100% utilization if it were used 286 days of the year. "Double bookings" could increase the facility's revenue without increasing the number of days.

1 Overall Facility Utilization (all events, upper and lower levels)

The records for Centennial Hall for the years 2004, 2005 and 2006 show the following level of facility bookings expressed as "event days" (see Section 1.5 for a more detailed breakdown of event days).

	2004	2005	2006
Concert Hall	130	115	124
Lower Hall	55	57	66
Total Event Days*	144 / 286	135 / 286	155 / 286
Percentage	50.3%	47.2%	54.2%

*Total event days are less than the sum of event days in the Concert Hall and the Lower Hall, since both of these spaces may be booked on the same event day.

.2 Concert Hall Utilization (all events, upper level only)

Within the overall utilization, the Concert Hall's usage profile was:

	2004	2005	2006
Theatrical event days	97	83	92
Non-theatrical event days	58	63	72

.3 Theatrical and Performing Arts Utilization

Within the category of theatrical utilization, the Concert Hall's usage profile was:

	2004	2005	2006
Popular music (includes rock, C&W, etc)	15	10	18
Classical music	33	33	29
Comedy and headliners	1	0	4
Dance and Other	10	8	9
Total Events*	59	51	60

* The total number of theatrical events is less than the total number of theatrical event days, because some shows and events have a run that extends over several days.

1.2 Conclusions about Usage of Centennial Hall

Centennial Hall is underutilized by any standard. The average overall usage for 2004, 2005 and 2006 for the entire facility was only 50% of available booking days.

Within this overall usage, performing arts events accounted for an average of 91 days or 32 % of available days. Within these 91 days, there was an average of 57 separate performing arts attractions.

1.3 Sources of Revenue

Centennial Hall generates revenues related both to theatrical and non-theatrical uses. The financial reporting format for Centennial Hall unfortunately does not differentiate between these uses lumping all uses into an omnibus "Hall Rentals" category.

	2004	2005	2006 (to Nov 30.)
Hall Rental Income	\$287,856	\$268,479	\$286,058
Total Income	\$522,631	\$479,287	\$624,637
Hall Rental as % of Total	55%	56%	\$46

1.4 Observations Related to Cost/Benefit

The net cost of operating municipal theatre facilities in Ontario varies so widely that it is virtually impossible to make useful comparisons either on the basis of facility area or on the basis of cost per seat.

Most municipalities can compare the net cost of their theatres to the net cost of their rinks and pools (\$200,000 to \$300,000) as a benchmark for value to the community.

The net cost to the City of London for Centennial Hall has been:

2004	2005	2006 (to Nov 30.)
\$88,676	\$115,863	\$13,339

Given the size of the facility and the number of seats, Centennial Hall is a bargain as a municipal performing arts centre, comparing very favourably with the cost of running public facilities in Ontario.

However, the utilization analysis tells another story: that is, while the net cost is undeniably low, there is also a very low level of cultural benefit.

This bargain is therefore a bit illusory: first, because the overheads are being supported by a large percentage of non-theatrical uses and, second, because the theatrical usage is both low and poorly representative of the available product.

The possible reasons for Centennial Hall's low utilization rate (e.g., user resistance due to facility condition, weak audience demand, etc) are explored elsewhere in this report.

1.5 Detailed Overview of Centennial Hall Event Days

In the tables below, "theatrical" event days are bookings for any arts-related event (e.g. shows, concerts, plays, dance performances, dance contests, etc.).

.1 Event Days - 2004

Month	Upper	Lower	Theatrical	Non-Theatrical	Total Event Days*
January	14	5	11	8	16
February	11	7	9	5	12
March	13	3	10	1	13
April	14	6	14	1	14
May	14	7	14	7	15
June	6	3	1	5	7
July	6	4	1	7	7
August	5	2	0	5	5
September	7	5	3	8	11
October	13	5	11	5	16
November	16	4	13	4	16
December	11	4	10	2	12
Total	130	55	97	58	144 / 286
Percentage					50.3%

* The total # of event days is not the same as the sum of upper and lower hall bookings, since some of these occurred on the same day.

* Event days do not include bookings for set up, take down, or rehearsals.

.2 Event Days – 2005

Month	Upper	Lower	Theatrical	Non-Theatrical	Total Event Days*
January	10	6	8	8	13
February	11	3	10	2	11
March	10	3	4	8	11
April	15	4	14	1	15
May	15	9	13	6	17
June	9	6	1	8	9
July	1	4	0	5	5
August	2	4	1	5	6
September	7	6	2	9	10
October	11	5	9	5	12
November	14	3	12	4	15
December	10	4	9	2	11
Total	115	57	83	63	135 / 286
Percentage					47.2%

* The total # of event days is not the same as the sum of upper and lower hall bookings, since some of these occurred on the same day.

* Event days do not include bookings for set up, take down, or rehearsals.

.3 Event Days – 2006

Month	Upper	Lower	Theatrical	Non-Theatrical	Total Event Days*
January	10	6	9	7	12
February	10	2	8	3	10
March	11	2	7	5	12
April	14	6	13	1	14
May	16	10	14	6	18
June	10	3	5	5	10
July	2	16	2	16	17
August	1	7	0	8	8
September	14	5	6	11	15
October	10	3	8	4	12
November	13	2	9	3	14
December	13	4	11	3	13
Total	124	66	92	72	155 / 286
Percentage					54.2%

* The total # of event days is not the same as the sum of upper and lower hall bookings, since some of these occurred on the same day.

* Event days do not include bookings for set up, take down, or rehearsals.

Appendix A.8

Benchmark Facilities: Programming Information

A.8 BENCHMARK FACILITIES: PROGRAMMING INFORMATION

The events highlighted in bold are touring events that are not hosted by any facility in London. See Appendix XXX for a longer, more detailed list of events that could play in a new, mid-sized venue.

	WINSPEAR CENTRE	LIVING ARTS CENTRE	ROSE THEATRE	CENTENNIAL HALL
Main Stage	Performance Chamber	Hammerson Hall	Main Stage	Upper Level
Main Stage Events	+/- 325 events / year Event days / year N/A	Events / year N/A 203 event days / year	161 events / year 258 event days / year	86 events / year 115 event days

WINSPEAR CENTRE	LIVING ARTS CENTRE	ROSE THEATRE	CENTENNIAL HALL
<p>Facility Presentations on Main Stage</p> <ul style="list-style-type: none"> • Rajaton (6-person Finnish a cappella group) • Evelyn Glennie (Solo percussionist) • Jeff Healey • Ricardo Lemvo and Makina Loca (Latin / African music) • Buckwheat Zydeco (Creole party music) • Carol Welsman and the Edmonton Symphony Orchestra: Swing Ladies, Swing <p>The Winspear Centre is not funded by any level of government, except for a municipal grant of \$7,000 / year and a provincial grant of \$9,000 / year to put on a "Winspear Presents" (formerly "World at Winspear") series of 6-8 concerts.</p>	<ul style="list-style-type: none"> • The Amazing Kreskin • Judy and David's Boom Box (children's entertainers) • Canada Day 2007 (free performances, crafts, and demonstrations) • Leahy (Celtic & bluegrass music) • Dave and Ian Thomas (comedy & music) • Tower of Power (jazz, funk & rock music) • Holly Cole • Opera Ontario – Popera! With Richard Margison • Christmas with the Nylons (4-person a cappella group) • Ballet Jørgen • Canada – The Nutcracker • Big Comfy Couch – Molly's Full Moon Festival (children's theatre) • Amy Sky and Marc Jordan (light rock, jazz and country) • André-Philippe Gagnon (comedy) • The Frantics (comedy) 	<ul style="list-style-type: none"> • Clifford the Big Red Dog (children's theatre) • The Magic Flute (opera) • David Clayton Thomas (rock & blues) • Wonderful Town (music theatre) • The Blind Boys of Alabama (gospel and roots music) • Sex and the Second City (comedy) • Holy Body Tattoo: Running Wild (dance) • Colin James and the Little Big Band • The Arrogant Worms • Det lille Turnéteater: Hamlet (children's theatre from Denmark) • WAI 100% (Maori music) • Joseph and the Amazing Technicolour Dreamcoat • The Irish Descendants (Celtic music) • Michelle Wright (country music) • Classic Albums Live: Pink Floyd: The Wall 	<p>Centennial Hall is primarily a rental venue and does not run a facility-sponsored series.</p>

	WINSPEAR CENTRE	LIVING ARTS CENTRE	ROSE THEATRE	CENTENNIAL HALL
Facility Presentations on Main Stage (cont'd)	Aside from these, the Winspear is a rental venue.	<ul style="list-style-type: none"> Voices of Showtime with Peter Appleyard (jazz & classics) GoldiRocks with Judy & David (children's theatre) Robert Michaels (Latin jazz guitar) Matt Dusk (crooner) Just for Laughs Roadshow Sophie Milman (jazz singer) 	<ul style="list-style-type: none"> Stephen Kabakos: Elvis: The Way It Was Barrage (fiddle music, dance, theatre) Saramabalouf (jazz & blues) The Funk Brothers in Concert (Motown funk - touring) Classic Albums Live: Led Zeppelin Rising Tide: No Man's Land (new Canadian play) Decidedly Jazz Danceworks: Magnetic Consequences 	
Facility Rentals & Bookings	<p>MUSIC - Local orchestras & touring choirs; touring headliners (world music, classical, jazz, choral, jazz, experimental, folk, country, rock, pop, blues, gospel)</p> <p>PRIVATE FUNCTIONS - school performances and convocations; business meetings; weddings; dinners; media conferences; high-profile memorial services</p>	<p>DANCE - All kinds; mostly local dance studios and local cultural associations; some touring troupes</p> <p>MUSIC - School choir recitals, opera, symphony orchestra, comedy acts, world music & dance performers (both touring and local)</p> <p>PRIVATE FUNCTIONS - Church services, meetings, video, shows, corporate dinners, weddings, Christmas parties</p> <p>OTHER - Film screenings, seminars, lectures</p>	<p>SPOKEN WORD - Local and touring small theatre companies, large touring Broadway shows, poetry, story-telling, children's entertainers, high school performances and theatre festivals, comedy headliners and troupes, circus, acrobats, celebrity speakers, award shows</p> <p>MUSIC - Local opera company, symphony, concert bands, and talent shows; touring headliners (pop, rock, jazz, world music, gospel, country, Celtic, roots, funk, classical)</p> <p>DANCE - Touring troupes (ballet, hip-hop, jazz, contemporary, touring Celtic); touring competitions; and</p>	<p>PRIVATE FUNCTIONS - meetings, weddings, fundraisers, school classes, exams, and graduations; parties (school dances and formal dinners; New Years, reunions, Superbowl, engagements, weddings, scrap-booking, fish fry, etc)</p> <p>MUSIC - Local orchestra, choirs, concert bands; touring headliners (rock, alternative, pop, country, folk, world music, Celtic, crooners)</p>

	WINSPEAR CENTRE	LIVING ARTS CENTRE	ROSE THEATRE	CENTENNIAL HALL
Facility Rentals & Bookings (cont'd)	<p>SPOKEN WORD</p> <ul style="list-style-type: none"> - Comedy headliners and troupes; storytelling; celebrity speakers; award shows <p>OTHER - Broadcast performances, feature film and television filming</p>		<p>local dance studios recitals</p> <p>PRIVATE FUNCTIONS</p> <ul style="list-style-type: none"> - charity fundraisers, tours, meetings, corporate functions, conventions, flower shows, school graduations OTHER - civic events and festivals, flower shows, film shoots and television tapings 	<p>DANCE - competitions & workshops</p> <p>SPOKEN WORD</p> <ul style="list-style-type: none"> - Touring comedy headliners and troupes, local cultural association shows, story-telling, children's shows, celebrity speakers • OTHER - Festivals, trade shows, collectible and craft sales, psychic expos, health shows, live stunts, bodybuilding championships
Regular Presenters	<p>Local: Edmonton Symphony Orchestra, Edmonton Symphony Society, Edmonton Youth Orchestra, Pro Coro, Sundays at Three Organ Recital Series, Cosmopolitan Music Society, Cantillon Choirs, New Edmonton Wind Sinfonia</p>	<p>Local: Mississauga Symphony Orchestra, Mississauga Philharmonic Orchestra, Sinfonia Mississauga, Opera Mississauga, Mississauga Choral Society, City of Mississauga Recital Dance, Mississauga Children's Choir, Mississauga International Children's Festival, local school boards, local dance studios, local cultural and ethnic associations</p>	<p>Local: Brampton Lyric Opera, Brampton Symphony Orchestra, Brampton Concert Band, Brampton Music Theatre, local dance studios, local schools, A.C.T. Productions</p> <p>Touring: Classic Albums Live</p>	<p>Local: Orchestra London, Fanshawe Chorus London and the Gerald Fagan Singers, University of Western Ontario student associations, Women's Canadian Club, local unions, Dr. Disc record show and sale, local schools</p> <p>Touring: Stuart McLean, Puppetry of the Penis, Psychic Expo</p>

N/A = Information not available

**Unless otherwise noted, programming information for Centennial Hall is from 2005-2006 season, for Winspear and the Rose from the 2006-2007 season, and for LAC from the 2007-2008 season.*

Appendix A.9

The Rose Theatre: Usage in Its First Year of Operation

A.9 THE ROSE THEATRE: USAGE IN ITS FIRST YEAR OF OPERATION

The Rose Theatre in Brampton opened in September 2006. The following chart summarizes its confirmed bookings and events over its first year of operations (September 2006 to August 2007).

TYPE OF ACTIVITY	#
TOTAL USES	652
Total Internal Uses	95
Total Theatre Administration and Maintenance Uses	38
Total Promotional Uses (e.g. facility tours, open houses, photo shoots, subscriber nights, appreciation dinners, etc.)	57
Total External Bookings	557
Total Arts-Related Bookings (Performances, auxiliary uses, workshops, film shoots, and tapings)	477
Total Non-arts-related Corporate and Community Bookings	45
Total Civic Bookings	26
Total Unspecified / Ambiguous Bookings	9
TOTAL NUMBER OF PERFORMANCES	311
Main Stage	212
Secondary Hall	63
Public Square	36
Total Number of Shows*	152
Total Local	74
Total Out-of-Town / Touring	75
Total Ambiguous	3
Total Presented by the Rose Theatre	74
Total Local Presented by Rose	0
Total Out-of-Town / Touring Presented by Rose	70
Total Ambiguous Presented by Rose	4
TOTAL ARTS-RELATED AUXILIARY USES (e.g. rehearsals, auditions, load-ins, meetings, cast parties, support luncheons / soirees, etc.)	117
Main Stage	28
Secondary Hall	89
Public Square	0
TOTAL NUMBER OF ARTS-RELATED EDUCATION AND WORKSHOP USES	30
TOTAL NUMBER OF FILM SHOOT AND TAPINGS	19

Note: Performances are distinguished from shows here. For example, the show "Cats" was performed 3 times at the Rose (1 show / 3 performances).

Appendix A.10

Benchmark Facilities: Operations and Financial Information

A.10 BENCHMARK FACILITIES: OPERATIONS AND FINANCIAL INFORMATION

	WINSPEAR CENTRE	LIVING ARTS CENTRE	ROSE THEATRE
Ownership	Edmonton Concert Hall Foundation	City of Mississauga	City of Brampton
Governance	A non-profit organization with an 8-person Board of Directors and the Edmonton Symphony Orchestra as the exclusive share-holder	Registered not-for-profit organization, governed by an 18-member community-based Board of Directors	The theatre is part of the Arts, Culture and Theatre Section of the Community Services Department of the City of Brampton
Expenses	\$4.0 million (2006)	Confidential (Break-even)	\$3,851,735 (2007)
Revenues	\$3.9 million (2006)	Confidential (Break-even)	\$2,267,793 (2007)
Municipal Operating Grant	\$0 (2007)	Confidential	\$1,583,942 (2007)
Main Stage	The Winspear does not receive an automatic operating grant from the City. It applies to the City each year for special funding but rarely receives it. In 2006 the City gave \$66,000 but refused the application in 2007. The City does give about \$7,000 annually as a partial subsidy for the Winspear's presentation series.	In addition to its annual operating grant, the City provides the HVAC and the custodial, security, and some accounting services for the building. The City reserves the right to use the LAG's rooms for free provided they are not already booked.	Since the Rose Theatre is run as part of the Department of Community Services, the City simply covers its expenses (like transit, recreation facilities, and other programs offered by the City) rather than providing it with a set operating grant.
Rental Fees for Main Stage	Performance Chamber <ul style="list-style-type: none"> Commercial: \$2,600 / performance or 10% of gross ticket sales, whichever is greater. Two performances on one day: \$3,800 or 10% of gross ticket sales Non-profit: Mon-Wed: Min. \$2,300 or 10% of ticket sales, capped at \$4,000. Thu-Sun: \$2,500 or 10% of ticket sales, 	Hammerson Hall Confidential	Main Stage <ul style="list-style-type: none"> Commercial: \$300/hr, 5 hour minimum (i.e. \$1,500 min.) Non-profit: \$200/hr, 5 hour minimum (i.e. \$1,000 min.) Community-affiliated: \$145/hr, 5 hour minimum (i.e. \$750 min.)

	WINSPEAR CENTRE	LIVING ARTS CENTRE	ROSE THEATRE
	capped at \$4,200. Two performances on one day: \$3,000 or 10% of gross ticket sales, capped at \$4,700		

Note: The Living Arts Centre prefers to keep the details of its financial information confidential.

Appendix A.11

Survey of Theatres Seating 1,000 – 2,000 in Ontario

A.11 SURVEY OF THEATRES SEATING 1,000 - 2,000 IN ONTARIO

VENUE	CAPACITY	REGULAR PRESENTERS	EVENTS AND SHOWS	SUMMARY TYPES OF EVENTS
<p>Capitol Centre</p> <p>NORTH BAY</p> <p>Population: 53,966</p>	994 seats	<p>North Bay Symphony Orchestra</p> <p>Reel Big Movies (Monthly Film Club Movie Night)</p> <p>TOROS (young people musical theatre -- annual)</p> <p>Gateway Theatre Guild</p> <p>North Bay Kiwanis Festival of Music and Dance (annual)</p>	<p>Classic Albums Live: Queen: A Night at the Opera</p> <p>Jerry White and his Gentlemen of Swing</p> <p>George Canyon (country music -- touring)</p> <p>Dini Petty: A "Broad" View (one-woman performance)</p> <p>Roxanne Potvin (blues singer -- touring)</p> <p>Derek Edwards: Sleepless in Gogama (one-man comedy show)</p> <p>Los Lobos (country, folk, R&B, blues, traditional Spanish & Mexican music -- touring)</p> <p>Dads: The Musical (Tribal Productions -- touring)</p> <p>Natalie MacMaster (Celtic -- touring)</p> <p>Ballet Jørgen Canada: The Nutcracker</p> <p>Illstyle & Peace Productions: Same Spirit, Different Movement (hiphop dance & music -- touring)</p> <p>Wonderful Town (Broadway musical -- touring)</p> <p>Polyjesters (swing/folk/roots -- touring)</p> <p>Little Bear (children's theatre -- touring)</p> <p>Barrage: Vagabond Tales (fiddle music, dance, theatre -- touring)</p> <p>D'Vine (a cappella gospel trio -- touring)</p> <p>Jesse Cook (flamenco & world music guitar -- touring)</p> <p>France D'Amour (jazz & guitar -- touring)</p> <p>Scrap Arts Music (touring)</p> <p>Urban Cowboy: The Musical (touring)</p> <p>Robert Munsch Storytelling Concert (touring)</p> <p>North Bay Kiwanis Festival of Music and Dance (local)</p>	<ul style="list-style-type: none"> • Tribute bands (rock) • Musical headliners (rock, pop, swing/big band, country, blues, fiddle, roots, gospel, world music, jazz) • One-person shows • Comedy headliners • One-hit wonder bands • Broadway & musical theatre • Dance (ballet, hip-hop) • Children's Entertainers <p>Non-Theatrical Uses</p> <ul style="list-style-type: none"> • Birthday Parties • Art Gallery
<p>Centre in the Square, Raffi Armenian Theatre</p> <p>KITCHENER</p>	2,047 seats	<p>K-W Symphony</p> <p>Jeans 'n' Classics Band</p> <p>Centre in the Square presents</p>	<p>SERIES:</p> <p>Broadway Series: (1) Wonderful Town (touring?); (2) Joseph & the Amazing Technicolour Dreamcoat (touring?)</p> <p>Rock 'n' Roll Theatre Series: (1) Jesus Christ Superstar (touring); (2) Rent (touring?)</p> <p>Comedy Series: (1) Sex and the Second City (touring); (2) Just For Laughs Roadshow (touring); (3) Women Fully Clothed (touring)</p> <p>CIBC Wood Gundy Electric Thursdays Series (Jeans 'n'</p>	<ul style="list-style-type: none"> • Broadway musicals • Musical theatre • Comedy headliners and troupes • K-W Symphony • Jeans 'n' Classics Band (with the KWS) • Canadian plays • Magic shows

Population: 451,235	VENUE	CAPACITY	REGULAR PRESENTERS	EVENTS AND SHOWS	SUMMARY TYPES OF EVENTS
Centre in the Square, Raffi Armenian Theatre <i>(cont'd)</i>	See above	See above	See above	<p>Classics Band & the KW Symphony – local): (1) She Bops: Ladies of the 80s; (2) The Music of Billy Joel;</p> <p>(3) The Music of Abbey Road; (4) Symphonic KISS</p> <p>Great Canadian Play Series: (1) The Blinding Enlightenment of Nikola Tesla (touring?); (2) 3...2...1 (touring); No Man's Land (touring)</p> <p>Fantasy Series: (1) Joseph and the Amazing Technicolor Dreamcoat (touring?); (2) Extreme Magic: International Stars of Illusion</p> <p>Afternoon Series: (1) Famous People Players; (2) Unforgettable: The Music of Nat 'King' Cole, Louis Armstrong, Ray Charles, Johnny Mathis, etc. (touring); (3) Joseph and the Amazing Technicolour Dreamcoat (touring?); (4) Frank and Dean: A Tribute (touring?)</p> <p>Encore Series: (1) An Evening with Colin Mochrie and Brad Sherwood (comedy – touring) (2) Chantal Kreviazuk (pop music – touring); (3) The Music of Led Zeppelin (local – J&C band & KW Symphony)</p> <p>On Stage Series: (1) Garnet Rogers (folk music – touring); (2) John Gorka (folk music – touring); (3) Songwriter's Circle (annual event) with Shannon Lyon (local), Danny Michel, & Rob Szabo (rock & pop music)</p> <p>TD Canada Trust Family Fun Series: (1) Robert Munsch (touring); Beanstock (touring)</p> <p>OTHERS: Kodaly Choral Festival KW Opera: Tosca CITS presents: Harlem Gospel Choir (touring) Deborah J. Cameron Productions Presents: BB King (touring) Bowfire (fiddle & Celtic music) CITS School Program presents: Scrap Arts Music (pop & world music and dance) KWS: KWSignature KWS: Musically Speaking: Salute to the Women of Music</p>	<p>(Cont'd from above)</p> <ul style="list-style-type: none"> • Music headliners (pop, folk, gospel, blues, Celtic, choral, classical) • Tribute bands (rock 'n' roll & crooners) • School programming • Children's entertainers & shows • Opera • Ballet • Choral music

VENUE	CAPACITY	REGULAR PRESENTERS	EVENTS AND SHOWS	SUMMARY TYPES OF EVENTS
Hamilton Place, Ronald V. Joyce Centre for the Performing Arts, Great Hall HAMILTON Population: 692,911	2,181 seats	Local: Opera Hamilton Hamilton Philharmonic Orchestra Geritol Follies Pure Energy Dance Studio	KWS: Friday Pops KWS: Saturday Pops The Strawbs (Brit Rock – touring) CITS presents: Roch Voisine (touring) OH: Tosca (local) Harlem Gospel Choir (touring) Ray Price (touring) Bishop Ryan Catholic Secondary School Concert (local) The Mayflower and Hosanna Christian Choir (touring) HPO: Masterworks Concert #5: Mello Cello (local) Riverdance (touring) An Evening with John Tesh (music – touring) GF: Follies in Love Again (Seniors' variety show – local) Micky Dolenz (of the Monkees) Oldies' Concert (touring) Pure Energy Dance Studio: The Power of Dance (annual showcase event) Scotland the Brave (100 performers including a live orchestra, rousing choir, pipe-band and drum corps, highland dancers and Celtic fiddlers – touring) Hi-5 (Children's show – touring) Women Fully Clothed (touring) Yamato: Japanese Drumming (touring)	Summary: <ul style="list-style-type: none"> • Opera • Musical headliners (gospel, country, choral, classical, Celtic, new age, Christian, rock, world music) • Dance (Celtic, Highland, ballet, jazz, tap, lyrical, musical theatre, acro, hip hop) • Symphony orchestra • Theatre (variety show) • Children's entertainers and shows • Comedy troupes
Living Arts Centre, Hammerson Hall MISSISSAUGA Population: 668,549	1,315 seats	Local: Living Arts Centre presents Mississauga Symphony Orchestra (MSO) Mississauga Philharmonic Orchestra (MPO) Sinfonia Mississauga	LAC presents: The Amazing Kreskin LAC presents: Judy and David's Boom Box (children's entertainers) LAC presents: Canada Day 2007 (free performances, crafts, and demonstrations) MSO: Into the West: A Cowboy Concert MCS: A Bouquet of Springsong Peel District School Board: Peel Music Showcase 2007 JCB Danceworks: That's Danceworks 2007 Celebrity Symphony Orchestra: Chopin and Friends Pegaz Art Production: ONE (Play performed entirely in Polish) City of Mississauga Recital Dance: Dance Explosion 2007 Just For Laughs Presents: John Pinette Hirnig Pilipino Choral Ensemble: Salamisim (music & dance)	Summary: <ul style="list-style-type: none"> • Dance (all kinds; mostly local dance studios and local cultural associations; some touring troupes) • Opera • Symphony Orchestra • Comedy acts • Local school boards • World music & dance performers, both touring and local • Magic shows

VENUE	CAPACITY	REGULAR PRESENTERS	EVENTS AND SHOWS	SUMMARY TYPES OF EVENTS
Living Arts Centre, Hammerson Hall <i>(cont'd)</i>	See above	Local <i>(cont'd)</i> : Mississauga Choral Society (MCS) City of Mississauga Recital Dance Mississauga Children's Choir	<p>The Ballet School of Woodbridge: A Mixed Programme The Dance Pac: Showcasing the Stars Arkan Dance Company and the Ukrainian Academy of Dance: 20th Anniversary Concert</p> <p>Oakville Academy for the Arts: What a Feeling Maple Academy of Dance: Dancing with the Popstars June Lawrence School of Dance: On Stage 2007 Dufferin-Peel Catholic District School Board: The Dufferin-Peel Artists Charity Gala Mississauga Children's Choir: Around the World in Eighty Minutes</p> <p>OPLENAC: Annual Concert (Serbian Cultural Association of Toronto and Mississauga - folklore, music and dance performance) Barvinok Ukrainian Dance School: Barvinok Annual Year-End Concert</p> <p>The Dance Extension: 10th Anniversary Showcase The Dance Corps: Dance Dreamz 2007 Sean Boutillier Academy of Dance: A Celebration of Dance Joint Chinese Choirs: Songs of Harmony UTM Tamil Students' Association: Suvadukal 2007 Omari Productions: Black Kukrudu (African a cappella, drumming, and dance group)</p>	<p>• Children's shows and entertainers</p> <p>Non-theatrical: Canada Day Celebrations</p>
Rose Theatre BRAMPTON Population: 433,806	880 seats	Local: Brampton Lyric Opera Brampton Symphony Orchestra Rose Theatre presents Brampton Concert Band Brampton Music Theatre Touring:	<p>RT presents: Clifford the Big Red Dog BLO: Magic Flute RT presents: David Clayton Thomas (rock & blues - touring) RT presents: Wonderful Town illstyle and Peace Productions: Same Spirit, Different Movement Tommy Hunter (country music - touring - b. in London) Rising Starz talent showcase (annual event) RT presents: The Blind Boys of Alabama Four Bitchin' Babes: Hormonal Imbalance: A Mood-Swinging Musical Revue RT presents: Sex and the Second City (touring) Tartan Terrors (Celtic comedy, music & dance grp - touring) Matt Dusk (crooner - touring): Charity fundraiser for Civic Hospital RT presents: Holy Body Tattoo: Running Wild (dance - touring)</p>	<p>• Broadway and musical theatre • Opera • Symphony Orchestra • Children's entertainers and shows • Musical headliners (blues, big band, gospel, folk, rock, Celtic, crooning, country, world music, flamenco, Motown, funk, classical) • Dance (hip hop, Celtic,</p>

		Classic Albums Live	RT presents: Colin James and the Little Big Band (touring) New Shanghai Circus featuring the Incredible Acrobats of China BSO: Be My Valentine Concert	modern, jazz) • Comedy troupes
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VENUE	CAPACITY	REGULAR PRESENTERS	EVENTS AND SHOWS	SUMMARY TYPES OF EVENTS
Rose Theatre (cont'd)	See above	See above	<p>RT presents: The Arrogant Worms Indie Arts Festival</p> <p>Classic Albums Live: Beatles: Sgt. Pepper's Lonely Hearts Club Band</p> <p>RT presents: Det lille Turnéteater: Hamlet (touring co. from Denmark; two-person musical adaptation of Shakespeare with double bass; for children)</p> <p>RT presents: WAI 100% (Maori world music – touring)</p> <p>BCB: Sax in the City (local)</p> <p>BMT: Anne of Green Gables (local)</p> <p>RT presents: Joseph and the Amazing Technicolour Dreamcoat (touring)</p> <p>Rita MacNeil in concert (touring)</p> <p>Mad Science: Newton's Revenge (touring)</p> <p>RT presents: The Irish Descendants (Celtic music – touring)</p> <p>RT presents: Michelle Wright (country music – touring)</p> <p>RT presents: Classic Albums Live: Pink Floyd: The Wall</p> <p>RT presents: Elvis impersonator Stephen Kabakos: Elvis: The Way it Was</p> <p>RT presents: Barrage (fiddle music, dance, theatre – touring)</p> <p>RT presents: Saramabalouf (jazz & blues, touring)</p> <p>BSO: Virtuoso concert (award-winning solo artists) Von Trapp Children in Concert</p> <p>RT presents: The Funk Brothers in Concert (Motown funk – touring)</p> <p>Fundraiser: Stewarding our Youth with Justin Trudeau</p> <p>Funkfest.ca: Funk is the Final Frontier: World Famous Chops Horns with LMT Connection & Newworldson (Motown funk – touring)</p> <p>RT presents: Classic Albums Live: Led Zeppelin IV Love & Laughter (???)</p> <p>RT presents: Rising Tide Theatre: No Man's Land (new Canadian play – touring)</p> <p>RT presents: Decidedly Jazz Danceworks: Magnetic Consequences (touring)</p>	<p>(Cont'd from above)</p> <ul style="list-style-type: none"> • Circus & acrobats • Tribute bands (rock, pop, blues) <p>Non-theatrical: Mayor's Levee</p>

VENUE	CAPACITY	REGULAR PRESENTERS	EVENTS AND SHOWS	SUMMARY TYPES OF EVENTS
Rose Theatre (cont'd)	See above	See above	Eva Avila (touring) Four Bitchin' Babes: Hormonal Imbalance: A Mood-Swinging Musical Revue (touring) RT presents: Jesse Cook (flamenco & world music guitar - touring) RT presents: The Celtic Tenors (touring) RT presents: Joan Rivers (touring) RT presents: Nnenna Freelon: Blueprint of a Lady: Sketches of Billie Holiday (touring) BLO: (1) I Pagliacci; (2) Bluebeard's Castle (local) RT presents: Scrap Arts Music BSO: Beethoven's 9 th	See above
St. Clair Centre for the Arts, Chrysler Theatre WINDSOR Population: 323,342	1,211 seats	Windsor Symphony Orchestra Windsor Light Opera Riverfront Theatre Company Windsor Dance Experience Centre for Seniors University of Windsor	André Philippe Gagnon (comedy - touring) WLO: Miss Saigon WSO: Premier Classics: The Firebird Suite WSO: Peanut Butter 'n' Jam: Fiddle Red Riding Hood Noam Chomsky lecture (part of U of Windsor's conference on propaganda) (touring) K'Naan (rap/ reggae artist - part of U of Windsor's conference on propaganda) (touring) Classic Albums Live: Led Zeppelin IV (touring) Women Fully Clothed (comedy - touring) RTC: A Midsummer Night's Dream WDX: The Willis CFS: Home Celebrations (annual variety show w/ performers 50+) CFS: Jailhouse Rock (part of ElvisFest)	<ul style="list-style-type: none"> • Comedy headliners & troupes • Symphony orchestra • Opera • Lectures • Tribute bands (rock) • Repertory theatre • Dance (dance theatre - various styles) • Musical headliners (rock, hip hop) Non-theatrical: Mother's Day Brunch

Appendix A.12

Programming Potential For Proposed New Facility

A.12 PROGRAMMING POTENTIAL FOR PROPOSED NEW FACILITY

The following list identifies a wide variety of program packages that would be suitable for a concert hall seating 1,200-1,400 in the southern Ontario market.

Popular Music Concerts (touring)

Rock & Pop

- Burton Cummings
- Randy Bachman
- Glass Tiger
- Stampeders
- Blue Rodeo
- The Jim Cuddy Band
- Sloan
- Scrap Arts Music
- Great Big Sea
- Jann Arden
- Chantal Kreviazuk
- Von Trapp Children in Concert
- Prairie Oyster
- April Wine
- The Strawbs
- Roch Voisine
- Micky Dolenz
- The Arrogant Worms
- Canadian Idol Contestants (e.g. Kalan Porter and Eva Avila)

Country

- Emerson Drive
- Jullian Austin
- Stompin' Tom Connors
- Michelle Wright
- Tommy Hunter
- Buddy Wasisname and the Other Fellers
- Ray Price
- George Canyon
- Tommy Hunter (born in London)

Tribute Bands

- Stayin' Alive (Bee Gees Tribute)
- Fleetwood Dreams (Fleetwood Mac Tribute)
- Abbamania
- Classic Albums Live
- Stephen Kabakos – Elvis: The Way It Was
- Nnenna Freelon – Blueprint of a Lady: Sketches of Billie Holliday

Popular Music Concerts (local)

Rock

- Battles of the Bands
- Dakota Nights

Country

- Blues and Jazz
- Blues Power
- Chicago Pete

Roots and Folk

- Tamarack

World Music

- Alfredo Caxaj and Sunfest programming

Classical Music Concerts (touring)

Ensembles

- Tafelmusik
- Salute to Vienna

Soloists

- Liona Boyd

Classical Music Concerts (local)

Ensembles

- Orchestra London
- London Pro Musica
- UWO ensembles
- Brassroots

Blues, Jazz, and Classical Guitar

- Jeff Healy
- The Blues Brothers Revival
- Carol Welsman
- Jessie Cook
- France D'Amour
- BB King
- Saramabalouf
- Roxanne Potvin

Roots, Folk, and Gospel

- Tanglefoot
- The Rankin Family
- Natalie MacMaster
- Bowfire
- The Barra McNeils
- Fred Eaglesmith
- D'Vine (Gospel)
- Harlem Gospel Choir
- The April Verch Band
- Garnet Rogers
- John Gorka
- The Polyjesters
- Jerry White and his Gentlemen of Swing
- Los Lobos

Hip Hop, Rap, Reggae, and Funk

- K'Naan
- Funkfest.ca with LMT Connection and Newworldson
- Buck 65
- India.Arie
- k-os

World Music

- Yamato: Japanese Drumming
- WAI 100% (Maori music)
- Susan Aglukark
- Loreena McKennitt
- Buena Vista Social Club (full band or separately touring individual members)
- Himig Pilipino Choral Ensemble (music and dance)
- Joint Chinese Choirs
- Black Kukrudu (African a cappella, drumming, and dance group)

Choral Singers

- Amabile Choirs
- Fanshawe Chorus Singers (and Gerald Fagan Singers)
- UWO Choirs

Dance and Gymnastics (touring)

- Dance competitions (e.g. Dance, Dance, Dance; One Step Beyond; and Bedazzled)
- Barrage (Fiddle music, dance, and storytelling)
- Illstyle and Peace Productions (Hip hop)
- Royal Winnipeg Ballet
- Ballet Jörgen Canada
- Riverdance
- Lord of the Dance
- The Tartan Terrors
- Scotland the Brave (Highland dancers with a live orchestra, choir, and pipe band)
- New Shanghai Circus featuring the Incredible Acrobats of China
- Contestants from the reality television show, "So You Think You Can Dance?"

Dance and Gymnastics (local)

- Kala Manjari: A Celebration of the Performing Arts of India
- Schools of ballet, jazz, modern, and tap recitals (e.g. Dance Extreme)
- Sunfest's World Music and Dance Series

Opera (touring)

- Canadian Opera Company
- Pacific Opera Victoria
- Opera Atelier
- Opera Ontario
- Cast members from Bravo's reality television show Bathroom Divas: So You Want to Be an Opera Star?

Opera (local)

- UWOpera (University of Western Ontario's opera program)
- Orchestra London

Special Presentations (recorded or live to air)

Awards shows

- Canadian Idol (London Idol)
- Canadian Comedy Awards and Festival

CBC live performances

- Stuart McLean
- Madly Off in All Directions – Lorne Elliot
- Rick Mercer

Comedy

- Headliner comics (e.g. Colin Mochrie; André Philippe Gagnon; Just For Laughs Road Show performers)
- Comedy troupes (e.g. Second City)
- Trailer Park Boys
- Comedy festivals

Niche Audience Presentations

- Matinees for seniors/bus tour market
- Tie-ins with local restaurants/food and wine producers
- Performances geared to the conference market

Spoken Word Events

- Celebrity speaker series (e.g. Al Gore's "An Inconvenient Truth")
- Storytelling (e.g. Robert Munsch; Stuart McLean)
- Magic shows, mentalists, and hypnotists (e.g. The Amazing Kreskin; Extreme Magic: International Stars of Illusion)

School and Educational Presentations and Events

- Kiwanis Music Festival
- Sears Theatre Festival
- Choral Music Festival
- Dance and Gymnastic Festival
- High school music concerts
- University and College student group bookings for various events

Film Presentations

- Classic and repertory cinema series
- Film festivals

Civic Uses

- City of London meetings and presentations
- Public observances
- Town hall meetings and all candidate meetings
- School graduations

Commercial Uses

- Corporate meetings and presentations
- Retail presentations and fashion shows
- Motivational speakers

Festival Uses

Current festivals with an indoor component in London are:

- London International Children's Festival
- Fringe Festival
- Indiafest
- Kiwanis Music Festival
- Canadian Comedy Awards and Festival
- Burst: Outward Sound and Vision Festival
- Pride London
- Film Festivals (e.g. The London Canadian Film Festival, the London Lesbian Film Festival, and the London Jewish Film Festival)
- School Board Festivals – for example, the Choral Music Festival, and the Dance and Gymnastics Festival, and the Sears Drama Festival

A new facility would also permit the development of more festivals with indoor programming. For example, an earlier report by ARTEC recommends:

- A Ballet Festival (perhaps in collaboration with the Royal Winnipeg Ballet), and
- An Opera Festival (perhaps in collaboration with the University of Western Ontario's opera program and Orchestra London)

Appendix A.13

Theatre Case Studies Capital Costs

A.13 THEATRE CASE STUDIES – CAPITAL COSTS

Facility Name	Location	Seats	Construction Completion	Total Project Cost (Opening)	Total SF	Cost/SF
The Rose Theatre	Brampton	880	2006	\$51.6M	64,000	\$806
Chinese Cultural Centre	Scarborough	600	2006	13M	55,000	\$236
Four Seasons Centre for the Performing Arts	Toronto	2,071	2006	\$107.9M	337,890	\$319
St. Elizabeth School	Vaughan	350	2005	6.5M	32,000	\$200
Crescent School Theatre	Toronto	412	2004	\$8.0M	32,000	\$253
Charles W. Stockey Centre for the Performing Arts	Parry Sound	468	2003	\$9.8M	27,000	\$366
Country Day School Theatre	Richmond Hill	350	2002	\$7.9M	32,000	\$250
Magnus Theatre	Thunder Bay	250	2001	5.5M	15,000	\$366
River Run Centre	Guelph	785	1997	\$15M	50,000	\$300
Chan Centre	Vancouver	1,185	1997	27M	75,000	\$360
Winspear Concert Hall	Edmonton	1,800	1997	40M	65,000	\$600
Newmarket Theatre	Newmarket	390	1996	4.2M	18,000	\$233
North York Performing Arts Centre	North York	1,850	1993	67M	218,000	\$307
Theatre Aquarius	Hamilton	750	1991	12M	26,000	\$460
Centrepointe Theatre	Ottawa	1,000	1988	7M	30,000	\$233
Markham Theatre	Markham	528	1985	5.0M	33,000	\$150

Appendix A.14

Sample Operating Costs Pro Forma

A.14 SAMPLE OPERATING COSTS PRO FORMA

The estimates in the following sample table are based on the building occupancy and facility management costs for a 60,000 nsf facility.

1	BUILDING OPERATIONS COSTS	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5
2	Taxes					
3	Municipal Property Taxes	0				
4	Business Taxes	0				
5	Sub Total	0				
6						
7	Capital Costs					
8	Land Rental	0				
9	Financing/ Carrying Costs	0				
10	Capital Reserve Fund	100,000				
11	Sub Total	100,000				
12						
13	Insurance					
14	Property & Liability Insurance	20,000				
15	Sub Total	20,000				
16						
17	Energy Consumption					
18	Electricity	120,000				
19	Heating & Cooling	200,000				
20	Other 1	0				
21	Other 2	0				
22	Sub Total	320,000				
23						
24	Utilities					
25	Water & Sewage	20,000				
26	Waste & Recycling	10,000				
27	Sub Total	30,000				
28						
29	Cleaning & Repair					
30	Maintenance Supplies	5,000				
31	Glass Cleaning & Housekeeping	100,000				
32	General Maintenance & Repair	50,000				
33	Equipment Replacement	25,000				
34	Building Supplies	20,000				
35	Sub Total	200,000				
36						
37	Grounds Keeping					
38	Snow Clearing	5,000				
39	Landscaping/ grounds keeping	5,000				
40	Other	5,000				
41	Sub Total	15,000				

42						
43	Communications					
44	Telephone	10,000				
45	Cable/ Satellite	2,500				
46	Sub Total	12,500				
47						
48	Security System					
49						
50	Maintenance Service Contracts					
51	HVAC	0	2,500			
52	Interior Light Replacement	0	2,500			
53	Switch Gear	0	1,000			
54	Low Voltage Switching	0	0			
55	Fire Alarm	0	0			
56	Elevators	0	7,500			
57	Theatrical Production Equipment	0	7,500			
58	Electronic Equipment	0	1,000			
59	Sub Total	0	22,000			
60						
61	TOTAL BUILDING OP. COSTS	697,000	719,500			
62						
	BUILDING MANAGEMENT & PROGRAM DELIVERY					
63	COSTS					
64						
65		YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5
66	Administration Costs					
67	Office Equipment	2,500				
68	Office Operations	5,000				
69	Printing & Office Supplies	5,000				
70	Fees & Licenses	3,000				
71	Sub Total	15,500				
72						
73	Payroll Costs					
74	Full-time Staff & Benefits					
75	Part-time & Contract Staff					
76	Sub Total	1,000,000				
77						
78	Outsourced Administration					
79	Legal Costs	5,000				
80	Accounting Costs	5,000				
81	Sub Total	10,000				
82						
83	Training & Development	10,000				
84						
85	Expenses					
86	Concession Supplies for Resale	0				

87	Travel & Communications	5,000				
88	Advertising & Promotion	20,000				
89	Sub Total	25,000				
90						
91	TOTAL MGMT & PRGM COSTS	1,060,500				
92						
93						

TOTAL COSTS 1,757,500 1,780,000

Appendix A.15

List of Previous Centennial Hall Studies

A.15 LIST OF PREVIOUS CENTENNIAL HALL STUDIES

ARTEC Consultants (Arts Resources International), London Performing Arts Centre: Needs Assessment Study, 25 November 2003.

ARTEC Consultants, The Concert Theatre: London Performing Arts Centre, 25 November 2003.

Brian Hall Architect (in association with Theatre Projects, Frank Wolman Associates, Jaffe Acoustics, Hanscomb Consultants, Crossey Engineering, and Robert Halsall & Associates), PACT Feasibility Study Phase II Final Report, June 1988.

EllisDon Corporation, London Performing Arts Centre: Preliminary Program Estimate, 20 April 2004.

Insights Business, Marketing, and Research Consultants, Summary Report on Survey Research into Public Attitudes towards a New Performing Arts Centre for London, 15 December 1988.

Lett/Smith Architects, Centennial Hall Study, 1979.

Lett/Smith Architects, Centennial Hall Supplementary Study, December 1980.

Patrick Coles Architect, Performing Arts Centre: A Comprehensive Feasibility Study Prepared for the Corporation of the City of London, January 1989.

Performing Arts Centre for London, Business Plan, October 1989.

NOTE: FOR A LIST OF ALL THE REFERENCES AND SOURCES CONSULTED OVER THE COURSE OF THE CURRENT FEASIBILITY STUDY, SEE THE APPENDICES IN THE MARKET REPORT.

