

Greater Entertainment for Greater Sydney

Permanent Performance Shells in Sydney's Iconic
Parklands



CMG CEDAR MILL
GROUP

BUSINESS
WESTERN
SYDNEY

BUSINESS
SYDNEY

HATCH | RobertsDay

SOUND
DIPLOMACY

We acknowledge the Traditional Owners of the land where we work and live. We pay our respects to Elders past, present and emerging.

We celebrate the stories, culture and traditions of Aboriginal and Torres Strait Islanders of all communities who also work and live on this land.

Preface

Greater Sydney is one of the world's great cities, and needs a culture and entertainment offer to match. Outdoor events and festivals are a central part of the cultural life of our city, yet remarkably we still lack a dedicated permanent venue for outdoor events. This has been recognised as a gap in Sydney's cultural infrastructure provision for many years.

This report presents a new vision for outdoor entertainment in Greater Sydney, through the creation of state-of-the-art permanent performance 'shells', integrated into and enhancing diverse parklands in Sydney's three city centres: The Domain, Parramatta Park, and South Creek Park in Western Sydney's new Bradfield City Centre.

A ground-breaking cultural infrastructure project, this is an opportunity to revitalise Sydney's live music sector, diversify our night-time economy, activate our open spaces, and generate substantial wider social and economic benefits across Greater Sydney. These venues will not only cater to an increased number and variety of live events catering to Greater Sydney's diverse communities, but create adaptable new settings for recreation and community use on a day-to-day basis.

Permanent outdoor venues of this kind have become a beloved part of the cultural landscape in cities around the world, clearly demonstrating the potential benefits for Greater Sydney.

This initiative brings together Greater Sydney's two business chambers (Sydney Business and Western Sydney Business), with the Cedar Mill Group, which is dedicated to bringing world-class outdoor entertainment to Australia. We are united in our view on the benefits this project can bring across our Metropolis of Three Cities. Cedar Mill Group is already progressing comparable venues in a number of locations nationally, with the expertise and commitment to do the same in Greater Sydney.

Together, we want to see Greater Sydney enjoying the benefits of outdoor venues by the mid 2020s. We look forward to a positive conversation with Government around how to move this project forward.



David Borger
Executive Director
Business Western Sydney



Paul Nicolaou
Executive Director
Business Sydney



Paul Lambess
Founder and Managing Director
Cedar Mill Group

BUSINESS WESTERN SYDNEY

Business Western Sydney is the region's peak business advocacy organisation representing a regional economic footprint in the tens of billions. Our members include the CEOs, chairs and leading executives from more than 110 top global businesses, major Australian corporations, local not-for-profits and government agencies with a significant presence in Western Sydney.

BUSINESS SYDNEY

Business Sydney is the voice for business in Sydney. We advocate, influence and deliver policies and outcomes to drive economic growth and create opportunities to invest, work, live and visit our city. For nearly two hundred years, we have worked to advance Sydney as a global, competitive and liveable city.



Cedar Mill Group was established by Winarch Capital in 2020 to lead its ambitious growth plans into the tourism and events sector. The showpiece within our regional venue circuit is Cedar Mills Lake Macquarie, a 30,000 seat amphitheatre which is well under construction and due for completion in 2024. Cedar Mills also operates several companies which are specialists in their field of event management, security and risk management, venue operations and video production.

This report has been prepared by Hatch RobertsDay with cultural research and strategy consultancy Sound Diplomacy.

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Executive Summary

A vision for a new era of live entertainment in Greater Sydney: state-of-the-art permanent performance shells in diverse parklands in its three city centres.

The success of Greater Sydney's future as a growing global city is dependent on great culture and entertainment – areas in which the city has been falling behind its competitors.

Greater Sydney's live performance sector has been struggling, with performance venues closing at an unprecedented rate, deterring international acts and limiting home-grown talent. Greater Sydney's growing appetite for outdoor entertainment and cultural events cannot be met with temporary venues that are costly, disrupt public access and are unable to endure extreme weather events.

Permanent performance shells in Sydney's parklands are an opportunity to revitalize live entertainment and deliver wider cultural, social and economic benefits across Greater Sydney. Despite a growing outdoor event and festivals sector making use of public parklands, Greater Sydney still lacks a permanent home for such

events, in stark contrast to many cities throughout the world.

State-of-the-art permanent performance shells offer a better experience for spectators, a more attractive proposition for performers and promoters, and reduced disruption for the public. Designed as iconic cultural pavilions, they will be integrated into, and activate, city-scale parklands for enjoyment by all.

Hosting a broad range of events for diverse communities, these performance shells will broaden access to cultural opportunities to deliver a boost to Greater Sydney's live music sector, revitalise its night-time economy and provide new ways for residents to enjoy and connect within open spaces, encouraging wellbeing and building community cohesion.

Collectively, these bandshells can address the imbalance in public investment into cultural infrastructure compared with sports facilities, and tackle the inequities in access to culture and entertainment across Greater Sydney.

Our vision is to create three performance shells in iconic parklands in Greater Sydney's three city centres. Each shell will respond to the distinctive character of its city and parkland setting.



1.1 MILLION
ATTENDEES ANUALLY



2,362
PERMANENT JOBS CREATED



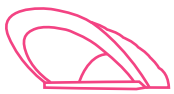
\$453 MILLION
ECONOMIC IMPACT ACROSS
GREATER SYDNEY EVERY YEAR



\$ 104 MILLION
ADDITIONAL OUT-OF-VENUE
SPENDING



217,000
NUMBER OF TOURISTS
ATTRACTED ANNUALLY



The Domain Eastern Harbour City

The Domain Shell will transition the current temporary stage used for annual events to a permanent structure that enhances the Domain's historic setting, while accelerating the Harbour CBD's transition from business district to multi-layered cultural destination.



Parramatta Park Central River City

Upgrading the successful Crescent outdoor space will be the next step in Parramatta Park's transformation into a great City Park. The Crescent Shell will complement the emerging Paramatta River Cultural Precinct, as part of the evolving cultural offer in Australia's fastest-growing city.



South Creek Park Western Parkland City

Anchoring Sydney's newest city centre in Bradfield and activating the new city-scale South Creek Park, the Bradfield Shell will reflect the Western Parkland City's Indigenous heritage and focus on innovation, creating one of the Asia-Pacific's most competitive venues for major outdoor events.

These new venues will be a first of their kind in Australia and the most expansive and ambitious cultural-led infrastructure project of its kind in the world: creating three global landmarks that will host 1.1 million attendees each year, generating over 2,300 jobs and delivering \$453 million in economic impact across Greater Sydney annually, plus a further \$104 million in annual out-of-venue spend. With a construction cost of only \$350 million for the three shells, this represents an exceptional public return on investment.

The history of the Sydney Opera House shows the transformative impact that cultural infrastructure can have on our city. As Greater Sydney undergoes a period of unprecedented change, now is the time deliver the next generation of cultural infrastructure: Greater Entertainment for Greater Sydney.



Greater Sydney Needs Great Culture and Entertainment

Culture and entertainment are key to Sydney's future success

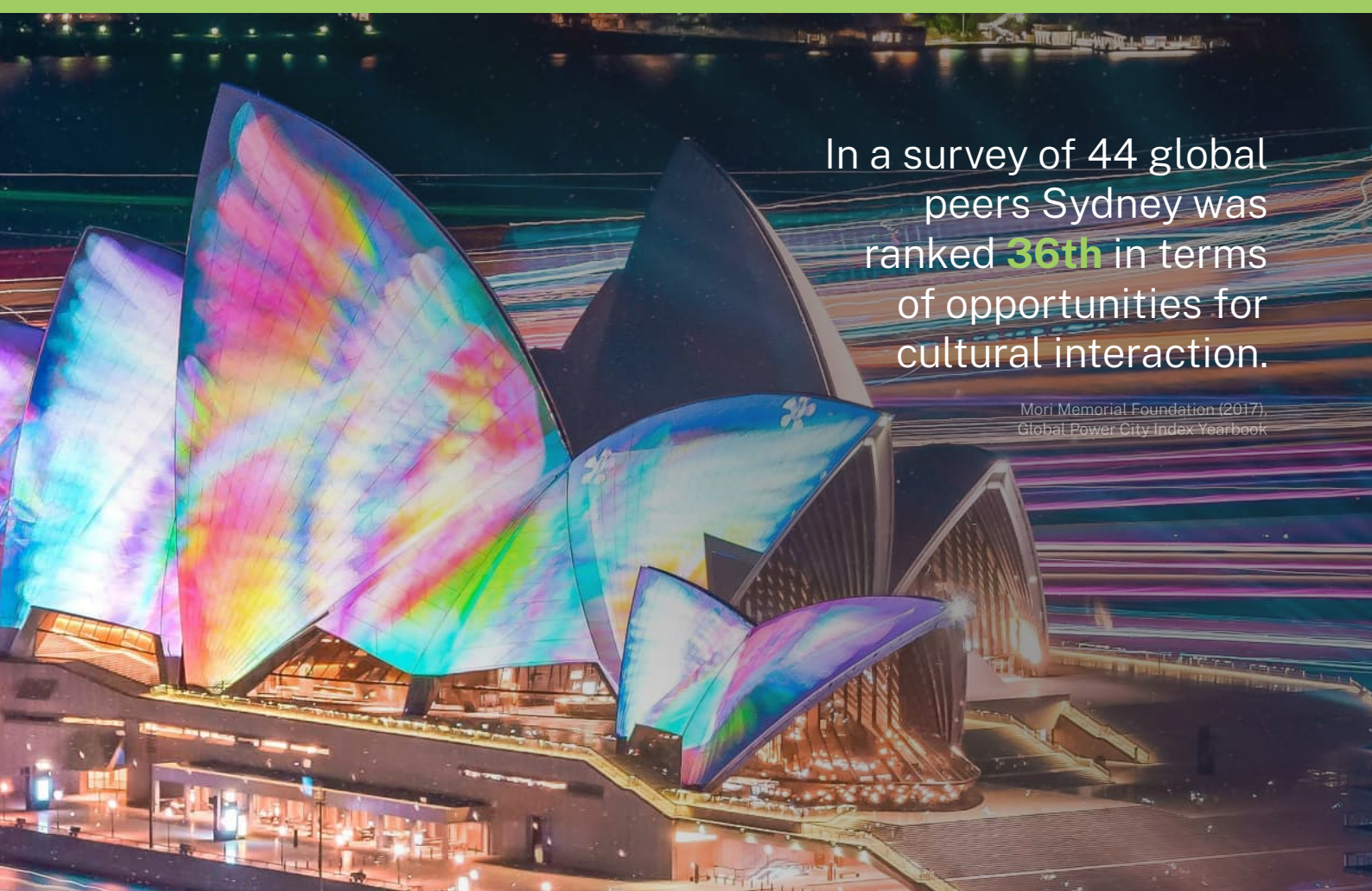
Greater Sydney has big ambitions. Perceived as Australia's only true global city, Sydney is one of a group of contenders vying for an established top-tier position among world cities, together with the likes of London, Singapore and Hong Kong. NSW aims to be the leading visitor destination in the Asia-Pacific by 2030. Greater Sydney is also experiencing an unprecedented period of growth and anticipating a population increase to more than 8 million people by 2056.

Culture, entertainment and the night-time economy will be essential to helping Sydney meet these goals. Nurturing these offerings will help Sydney compete for top talent, investment and tourism from within Australia and the world. They underpin Sydney's livability, metropolitan identity and community cohesion, essential for a rapidly-growing city.

Sydney is falling behind

While Sydney does offer numerous cultural strengths, such as world-class institutions and a thriving, globally renowned calendar of events and festivals, its cultural offering is falling short. A review for the Greater Sydney Commission concluded that Sydney "is not yet fulfilling its cultural potential or optimising the potential of its cultural assets".¹ In a survey of 44 global peers, Sydney was ranked 36th for opportunities for cultural interaction, and 29th for providing an environment for creative industries.²

Sydney's live entertainment sector was struggling even before the challenges of the COVID pandemic. NSW experienced the country's largest fall in revenue and ticket sales for live performance in 2019 alone³, and was overtaken by Victoria as the nation's largest live performance market in 2017.⁴ This is attributable to years of more restrictive regulation including the Lockout Laws leading to closure of venues, higher ticket prices for the public and an overall loss of confidence in the sector. Music promoters and theatre producers cite a shortage of available space as a reason why international shows often pass over Sydney for Melbourne.⁵



In a survey of 44 global peers Sydney was ranked **36th** in terms of opportunities for cultural interaction.

Mori Memorial Foundation (2017),
Global Power City Index Yearbook

Similar challenges have affected the broader night-time economy, which has also seen widespread closure of venues and long suffered a reputation for being mono-dimensional and focused on alcohol consumption. Surveys of the public often indicate low satisfaction with the quality and accessibility of Sydney's night-time offering.⁶ In 2019, Sydney's night-time economy was estimated at over \$27 billion per annum, but could be worth \$43.3 billion if it matched the night-time economy in the UK.⁷

Access to culture and entertainment is highly uneven across Greater Sydney. Leading venues, institutions and night-time hubs are concentrated around the harbourside CBD and inner-city suburbs, giving growing areas across Greater Sydney much poorer access. This contrasts with many global competitor cities, which have multiple strong cultural districts.

Underinvestment in culture contrasts with the significant emphasis placed on sports and sporting venues. In the survey that showed Sydney falling behind cultural offerings by global peers, Sydney ranked second globally for the number of sports stadiums⁸, while NSW has recently spent more

than \$1 billion on revitalising the Sydney Football Stadium and Parramatta Stadium.

Without decisive efforts to improve its culture and entertainment sectors, Sydney risks not only losing out to global competitors, but falling behind other cities in Australia, which will impact its global city status. Melbourne, which has made a long-term concerted effort to prioritise culture, has now overtaken Sydney as the de facto cultural capital of Australia. In 2017, Melbourne was declared the 'live music capital of the world', with more venues per capita than any other city.⁹

¹ The Business of Cities (2018), Vol. 2, Culture, Value and Place: Greater Sydney Case Study

² Mori Memorial Foundation (2017), Global Power City Index Yearbook

³ EY (2021), Live Performance Industry in Australia: 2019 and 2020 Ticket Attendance and Revenue Report

⁴ Sydney Morning Herald (2018), NSW loses mantle as biggest live performance industry to Victoria

⁵ Sydney Business Chamber (2018), The Show Must Go On: Supporting the Growth of Live Performance Infrastructure in NSW

⁶ CIPMO Survey cited in The Business of Cities (2018), Vol. 2, Culture, Value and Place: Greater Sydney Case Study

⁷ Deloitte, Imagine Sydney, 2019: www2.deloitte.com/

⁸ Mori Memorial Foundation (2017), Global Power City Index Yearbook

⁹ The Music Network (2018), 'Live Music Census shows Melbourne has most live music venues in the world per capita'

The Opportunity for Permanent Performance Shells

Permanent performance shells in Greater Sydney's diverse parklands are an opportunity to revitalise live entertainment and deliver it broader social and economic benefits.

Performance shells are dedicated stage structures for outdoor performances. They feature acoustic design to improve the sound projection of performances, with high quality audiovisuals and integrated back-of-house infrastructure. Their iconic design has the capacity to offer visual beauty and character to an otherwise blank stage.

Performance shells can be combined with a mix of permanent seating, temporary seating and flexible landscaped space for audiences. Acting as iconic cultural pavilions within public parklands, shells can be fully open to the public access throughout the week, providing new settings for recreation and community activities when not in use for major events.

The missing piece in Sydney's cultural infrastructure

Globally, permanent performance shells have become essential and beloved parts of the cultural infrastructure of many cities, most notably in the United States (see Case Studies).

Permanent outdoor venues are rare in Australia, which is remarkable given our climate and appetite for outdoor events. There are some notable exceptions. Melbourne's Sidney Myer Music Bowl, with a capacity of 13,000, has been operational since 1959. The Brisbane River Stage, for 9,500 people, opened in 1989. The HOTA (Home of the Arts) Outdoor Stage on Queensland's Gold Coast, a state-of-the-art contemporary shell for 5,000 people, opened in 2018.

Sydney has a growing and thriving calendar of outdoor events held in public parklands across the city. Yet we lack a dedicated, permanent home for outdoor events. Studies of Sydney's cultural infrastructure provisions have repeatedly identified this as a major gap¹⁰, with public surveys showing that the community shares this view.¹¹



Sidney Myer Music Bowl, Melbourne



River Stage, Brisbane

Advantages over temporary events

The dedicated infrastructure of permanent performance shells offers a better experience for audiences and performers than temporary event structures—including better acoustics and audiovisuals, and fit-for-purpose front-and back-of-house facilities.

Permanent shells avoid the expensive set-up costs associated with temporary stages, making outdoor performances more accessible for artists and promoters and more affordable for the public.

They greatly reduce the disruption caused by construction, operation and dismantling of temporary events and the associated damage to public parklands, which has become an increasingly severe issue with the frequency of climate change-induced rain events. (For example, during Sydney's Night Noodle Market in 2022, damage to Prince Alfred Park due to heavy rains led to the park's closure to the public for several weeks).

They will also avoid the carbon footprint generated by truck movements when setting up temporary stages.

Shells can be acoustically designed to minimise wider sound dispersion, reducing noise impacts on surrounding communities and allowing venues to operate more frequently and later into the evening.

Diverse programming

Highly flexible by nature, performance shells can host a variety of free and ticketed events, from festivals and major concerts featuring international acts, through to small-scale performances, movie screenings and community events.

Beyond events, they can provide a malleable, expansive space for community members to use every day—be it to exercise, stage a Speakers' Corner, host a public meeting, connect with friends or relax.

¹⁰ Including: Sweet Reason (2011), Planning Sydney's Cultural Facilities; Create Infrastructure (2019), Cultural Infrastructure Plan 2025+; Committee for Sydney (2022) Commission into the Future of Sydney CBD: Recommendations and Actions

¹¹ CIPMO Survey cited in The Business of Cities (2018), Vol. 2, Culture, Value and Place: Greater Sydney Case Study



Damage to Prince Alfred Park after rains during Night Noodle Market, 2022



Yoga at the Rady Shell, San Diego



Entry Portal

Micromobility Station

Cafe Pavilion

Front of House

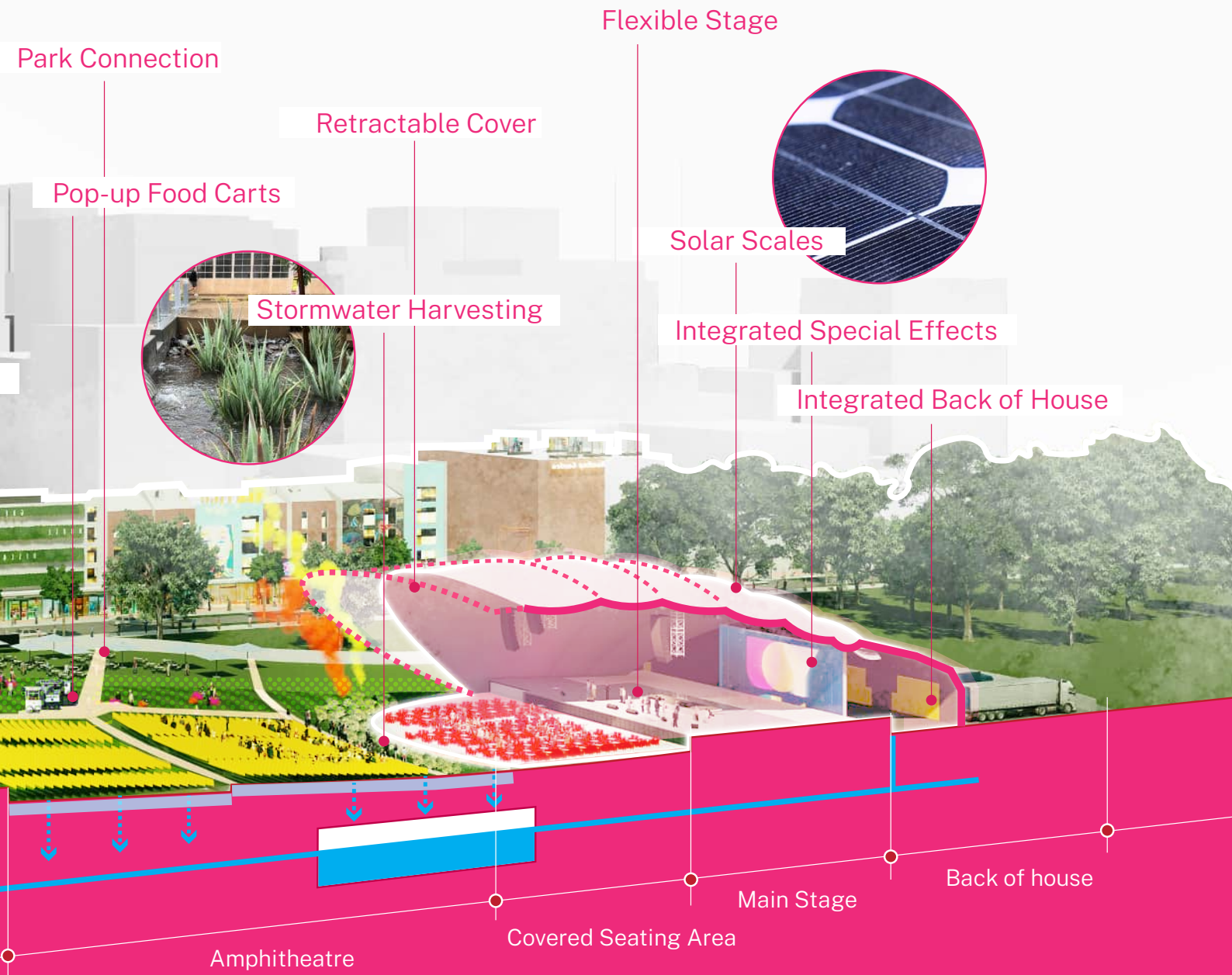
Flexible Seating Area





Permanent Shell Concept: Day-To-Day Use

Integrated into public parklands, shells will provide a new setting for recreation and community activities when not in use for major events.





Free Event Zone

Large Scale Event

Flexible Seating Area





Permanent Shell Concept: Major Events

Performance shells will provide a home for more frequent and diverse outdoor performances, with an improved experience for audiences and performers.

Typical Annual Programming



40+
TOTAL EVENTS



10+
FREE EVENTS



12+
MAJOR
INTERNATIONAL
EVENTS



20+
SMALL AND
MID-SIZED
PERFORMANCES



Key Benefits



Revitalising live entertainment

An increased capacity to host live performances through permanent structures will help Sydney attract more global acts and benefit local performers, both of whom have been deterred by shortages of space.

In particular, permanent shells can address a gap in Sydney's live entertainment venues between theatres (such as the 1,600-capacity Enmore Theatre) and large arenas/stadiums (such as the Qudos Bank Arena with a capacity of 21,000). The almost complete lack of venues in between these sizes has been a deterrent for international touring acts and a barrier for the development of Australian bands looking to scale up but not yet able to fill an arena or stadium show.

By showcasing the high-quality emerging and established talent Sydney has to offer, permanent performance shells will strengthen the identity and visibility of Sydney's live music sector and overall cultural ecosystem.

The diversity of events that can be accommodated in performance shells (including free events) can serve a cross-section of the community, broadening access to the performing arts and reducing barriers to cultural participation in Greater Sydney.



Creating a 24 Hour City

Sydney's night-time economy is bouncing back after the COVID-19 pandemic and repeal of its lockdown laws in 2021. There is widespread recognition that the relaxation of these restrictions represents an opportunity to 'reset' and reimagine Sydney's nightlife to be more diverse, inclusive, readily available and widely accessible.

Performance shells will be a significant addition to this new night-time landscape. Providing new venues for year-round programs of safe, inclusive night-time activities, they will also help drive increased activity for nearby businesses and night-time entertainment precincts.





Promoting wellbeing and community cohesion

Outdoor entertainment provides new opportunities to engage with arts and culture in a fun and relaxed setting, promoting mental, physical and emotional wellbeing.

Overseas examples (such as those highlighted in the Case Studies on the Rady Shell in San Diego and Levitt Venues across the US) highlight how the welcoming, communal nature of outdoor events can bring communities together and build social capital across diverse cultural and social groups.



Activating parklands

Outdoor entertainment provides new opportunities to engage with arts and culture in a fun and relaxed setting, promoting mental, physical and emotional wellbeing.

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Stimulating the economy

Permanent performance shells will stimulate increased activity throughout Sydney's cultural and creative supply chain, and generate audience spending outside the venues on transportation, food and drink and accommodation. They can have a catalytic effect on urban revitalization in surrounding areas.

As new internationally recognisable landmarks, they will contribute to attracting increased numbers of local, inter-state and international visitors to Greater Sydney.



Case Study: The Rady Shell at Jacobs Park, San Diego, USA

The Rady Shell at Jacobs Park is an open-air world-class venue located in Embarcadero Marina Park South, San Diego which opened in 2021.

Designed by Tucker Sadler Architects, Rady Shell was developed and is operated by the San Diego Symphony. More than 97 per cent of its USD \$85 million construction budget came from private donations. The Shell features a 360sqm stage and flexible seating capacity for up to 10,000 guests.

The Rady Shell has a custom-designed acoustic sound system with a surround design that uses more than 100 individual loudspeakers to ensure even coverage throughout its seated areas. Its first-class Elation lighting system features a symmetrical design that uses more than 200 IP-rated luminaires. Red-cushioned seats provide contrast with the green turf and the building's white architecture.

The Rady Shell is the first permanent outdoor venue in the history of the San Diego Symphony. The venue

program includes concerts, performances and screenings. The Shell also offers rental opportunities for conferences, keynotes, concerts and private events.

The Shell already hosts free community programs and free classical concerts aimed at audiences aged five and up, as well as free rehearsals open to the public, which attracts 100-200 attendees a month. Through a partnership with a leading gym, FIT Athletic, its free monthly outdoor yoga classes attract 200-500 participants per month.

During the 2021-22 season, the San Diego Symphony presented two Berton Family Young People's Concerts with free access for students and educators. Committed to accessibility, the San Diego Symphony Orchestra offers 100 \$10 tickets for every presentation at the venue. Its artistic and learning/ community engagement programs have reached more than 250,000 people. The Orchestra has 91 community partners, giving non-profit organisation members the opportunity to attend events for \$10. Through June 2022, the Symphony made available 5,200 tickets, and issued 2,228.



The Shell Provisions, the venue's culinary program, provides a wide range of local specialties. The venue has partnered with chef Richard Blais and offers a pre-order menu for guests in San Diego Row and the Marina and Parkside sections. Full-service kitchens are available at the Urban Kitchen and the Street Food Pavilion. There are also food carts and a 1,196-metre open-air dining space at Prebys Plaza.

The Rady Shell is committed to sustainability and helps preserve the wildlife habitat in its location by reducing night-time non-event display lighting during bird migration periods and promoting the use of LED screens and QR codes for information instead of sheets, among other initiatives. The venue encourages carpooling and has electric vehicle recharging stations in the site's parking lot. People using bikes and public transport to attend events receive a discount on an additional concert ticket. The venue uses non-disposable plates, glassware and cutlery, compostable packaging and to-go containers. Sustainable methods used to build the venue include a modular wetland/

stormwater treatment and drainage system, lawn areas composed of commercial-grade sand-based synthetic turf and energy-efficient LED lighting. Moreover, the San Diego Symphony has created an Environmental Response Committee working towards reducing its carbon footprint.

“The San Diego Symphony’s Rady Shell at Jacobs Park has quickly become an important new gathering place for San Diegans and visitors. It has given us opportunities to engage with the community and the world in ways we could only imagine just years ago. The Rady Shell builds upon San Diego’s strength as a year-round temperate climate bringing thousands of new people to the tidelands and a significant amount of attention to San Diego’s international profile. Given the overwhelmingly positive public reception in our first 18 months, we look forward to future filled with concerts, community gatherings, and important civic events.”

Katy McDonald

Chief of Staff

San Diego Symphony and Rady Shell at Jacobs Park



Case Study: Levitt Venues, Multiple Locations, USA

The US-based Mortimer & Mimi Levitt Foundation is helping revitalise communities by activating underused outdoor spaces as free live music events in partnership with community groups.

The Mortimer & Mimi Levitt Foundation brings people together in inclusive and welcoming environments through Levitt Venues, in multiple locations throughout the US. Levitt Venues is a creative placemaking initiative that transforms underused public spaces such as parks, plazas and former brownfield locations into celebrated community destinations through live music using permanent pavilions or bandshells.

To date, Levitt Venues can be found in Arlington, Texas; Dayton, Ohio; Los Angeles, California; Westport, Connecticut; Bethlehem, Pennsylvania; Denver, Colorado; and Sioux Falls, South Dakota.

These venues present up to 50 free concerts each year in a broad range of musical genres featuring local, national and international emerging talent and acclaimed, award-winning artists. The venues also present community programming and cultural performances that reflect the city's residents, heritage and traditions and are regularly used by non-profits, community groups and schools to encourage community engagement.

Levitt Venues elevates the overall wellbeing of a community by “reclaiming green space, building social capital, sparking additional investments in surrounding areas, deepening community attachment, and amplifying local pride”.

In 2016, the Levitt Foundation commissioned an Audience and Community Outcomes Exploration of the Memphis and Pasadena Levitt Venues to assess the predicted social outcomes of the venues and their programming on individual concertgoers and the wider community.



Levitt Venue, Dayton OH



Levitt Venue, Denver CO

This found that:

- **There is a communal spirit at Levitt concerts**, demonstrated through casual interactions between strangers and, even more so, bonding experiences within concertgoers' existing social networks in ways that are different from their usual social encounters.
- **Music ensures that the experience is a shared, communal one that diverse individuals have together, as a community.** Over half of concertgoers feel connected to their local community when attending a Levitt concert.
- **These moments build 'social capital'** - the value that is derived from existing within and being connected to a social network, which contributes to a host of positive economic, health, educational, and civic outcomes.
- **Audience demographics show a level of diversity** that is rarely found in more formal performing arts settings.
- **The open lawn setting and free admission engenders a "leveling" effect** that makes concertgoers feel a sense of equality with their fellow audience members.



Levitt Venue, Westport CT

Opportunities for the Three Cities

Creating three permanent performance shells in iconic parklands in Greater Sydney's three city centres will elevate each city's cultural offering and address disparities in culture and open space provision across the city.

Greater Sydney is undergoing a period of growth unprecedented in its history, with the population expected to increase to more than 8 million by 2056. Greater Sydney's metropolitan growth strategy aims to reshape the region into a 'Metropolis of Three Cities' – the Eastern, Central and Western cities – each with its own city centre. Much of Sydney's future growth will be focused in its Central and Western cities.

Sharp disparities in livability across its metropolitan area is recognised as one of the greatest challenges for Greater Sydney going forward – of which access to culture and open space are key dimensions. Currently, the majority of Sydney's cultural infrastructure and many of its night-time hotspots are concentrated in and around its Eastern Harbour CBD, with residents in the growing Central and Western cities having far less access to, and satisfaction with, cultural provision.

Similarly, residents of the Eastern City also have far better access to quality, well-activated open space than many parts of the Central and Western City. This was sharply highlighted during the COVID pandemic, which revealed these inequities while reminding us of the importance of open space for wellbeing.

Addressing these shortfalls is crucial to Sydney's future success, and the viability of the Three Cities strategy. Substantial investment in culture and open space across Sydney's emerging growth areas is needed to better serve existing communities and attract new residents and businesses.





In this context, our vision is to create three permanent bandshells in iconic parklands across Greater Sydney's three city centres. Each shell will become a leading landmark for its city, reflecting that city's distinctive character and identity and symbolising Sydney's commitment to investing equitably across its three cities.



The Domain Eastern Harbour City

The Domain Shell will transition the current temporary stage used for annual events to a permanent structure that enhances the Domain's historic setting, while accelerating the Harbour CBD's transition from business district to multi-layered cultural destination.



Parramatta Park Central River City

Upgrading the successful Crescent outdoor space will be the next step in Parramatta Park's transformation into a great City Park. The Crescent Shell will complement the emerging Paramatta River Cultural Precinct, as part of the evolving cultural offer in Australia's fastest-growing city.



South Creek Park Western Parkland City

Anchoring Sydney's newest city centre in Bradfield and activating the new city-scale South Creek Park, the Bradfield Shell will reflect the Western Parkland City's Indigenous heritage and focus on innovation, creating one of the Asia-Pacific's most competitive venues for major outdoor events.





DOMAIN SHELL

SYDNEY CBD

CRESCENT SHELL

SYDNEY AIRPORT

PARRAMATTA

LIVERPOOL

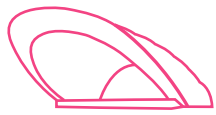
BRADFIELD SHELL

BRADFIELD

WESTERN SYDNEY
INTERNATIONAL AIRPORT

Nepean River

BURRAGORANG



Eastern Harbour City The Domain

The Harbour CBD and its inner suburbs are already the focal point for Greater Sydney's culture, tourism and 24-hour economy.

The Harbour CBD is the location of many of Sydney's leading cultural assets and its most popular events and festivals. Major investments in cultural infrastructure are underway including the Sydney Modern Project, Walsh Bay Arts Precinct and Sydney Opera House Renewal.

There has been wide recognition that, amid ongoing changes to working patterns, the CBD itself needs to transition from a business district to a 'multi-functional, multi-layered' centre with a rich cultural offering. Looking forward, the City of Sydney aims to secure its position as the cultural capital and premier live music and entertainment destination in the Asia-Pacific region.



The current program of annual events in the Domain is a fixture of Sydney's cultural calendar. However, the cost of more than \$2 mn to construct the temporary stage facilities each year and the reliance on an informal coalition of presenters makes its long-term sustainability uncertain. Temporary facilities also disrupt public access in and around the Domain during construction, operation and removal.

Transitioning to a permanent shell that enhances the historic setting and character of the Domain would address these drawbacks and provide an improved setting for more frequent and diverse events. A permanent outdoor venue within the CBD

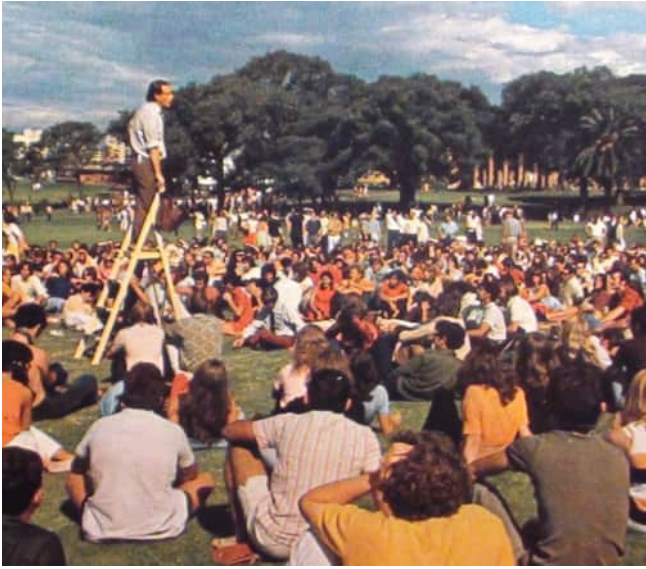
has been repeatedly identified as a key need in studies of Sydney's cultural infrastructure provision.

The Domain Shell will complement the other cultural assets set in and around parklands on the CBD's eastern edge, including the new Sydney Modern. It adds an iconic building to the Sydney skyline, with its sculptural sail echoing and making visible the progress in the city's ambitions since the Harbour Bridge (1932) and Opera House (1973).

The Shell supports the City of Sydney's aspiration to revitalise Macquarie Street as the city's 'civic and cultural spine' with greater activity outside working hours; and plans to better activate the Domain's western edge and improve connections to the city.



The Domain is a beloved **public space** on Sydney's doorstep...



...but arrangements for temporary events **disrupt public access** for weeks every year.





The Domain is among Australia's most historically and culturally important open public spaces, and Sydney's main civic open space since the 1830s.

The Domain Shell will be a low-impact structure that respects and enhances the Domain's aesthetic character and civic qualities. Its compact form will fit within the footprint of the annual temporary stage and maintain the existing network of pathways across the Domain. Its sculptural sail design references nearby Sydney landmarks, while the sandstone materiality of the stage will reference Sydney's natural and built heritage.





Central River City **Parramatta Park**

Parramatta, the heart of Sydney's Central River City, is growing and developing at an unprecedented pace, driven by transportation and infrastructure investment.

Parramatta is Australia's fastest-growing city, with a population expected to increase from around 258,000 to 469,000 over a 20-year period. At the same time, it is cementing its role as a primary economic hub in Greater Sydney.



The City of Parramatta recognises the need to ensure that this rapid growth is matched by an enriched cultural and night-time offering to maintain its attractiveness as a place to live and work. Alongside its Cultural and Night Time Economy strategies, a historical scale of investment is taking place in cultural facilities in the Powerhouse Precinct. This includes the Riverside Theater and Powerhouse Parramatta, the largest cultural infrastructure project in NSW since the Sydney Opera House.

On the doorstep of the Parramatta CBD, Parramatta Park is the essential green lung of this fast-growing city, but has not offered a landscape quality and

level of public activation fully commensurate with its role as a 'great city park'. New investment in and around Parramatta Park is bringing it closer to its potential, supporting its transition from an exclusive colonial landscape into an inclusive parkland.

The Crescent in Parramatta Park, which accommodates up to 18,000 people, is already one of Sydney's most successful outdoor entertainment locations. Upgrading the park with a permanent shell and amphitheatre will be a transformative addition to Parramatta's cultural and parkland offering – working alongside the adjacent Powerhouse Precinct and newly completed CommBank Stadium.



With new investment, Parramatta Park realising its potential as a **Great City Park**...



...with a permanent venue in The Crescent the **next step in the Park's evolution.**

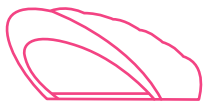


The Crescent Shell will enhance the existing Crescent with a state-of-the-art permanent stage, and a mix of permanent and temporary seating providing increased capacity.

The rear of the stage will be designed as a piece of landscaped topography, offering a scenic lookout over the Parramatta River and a distinctive new parkland feature for the community to enjoy.







Western Parkland City

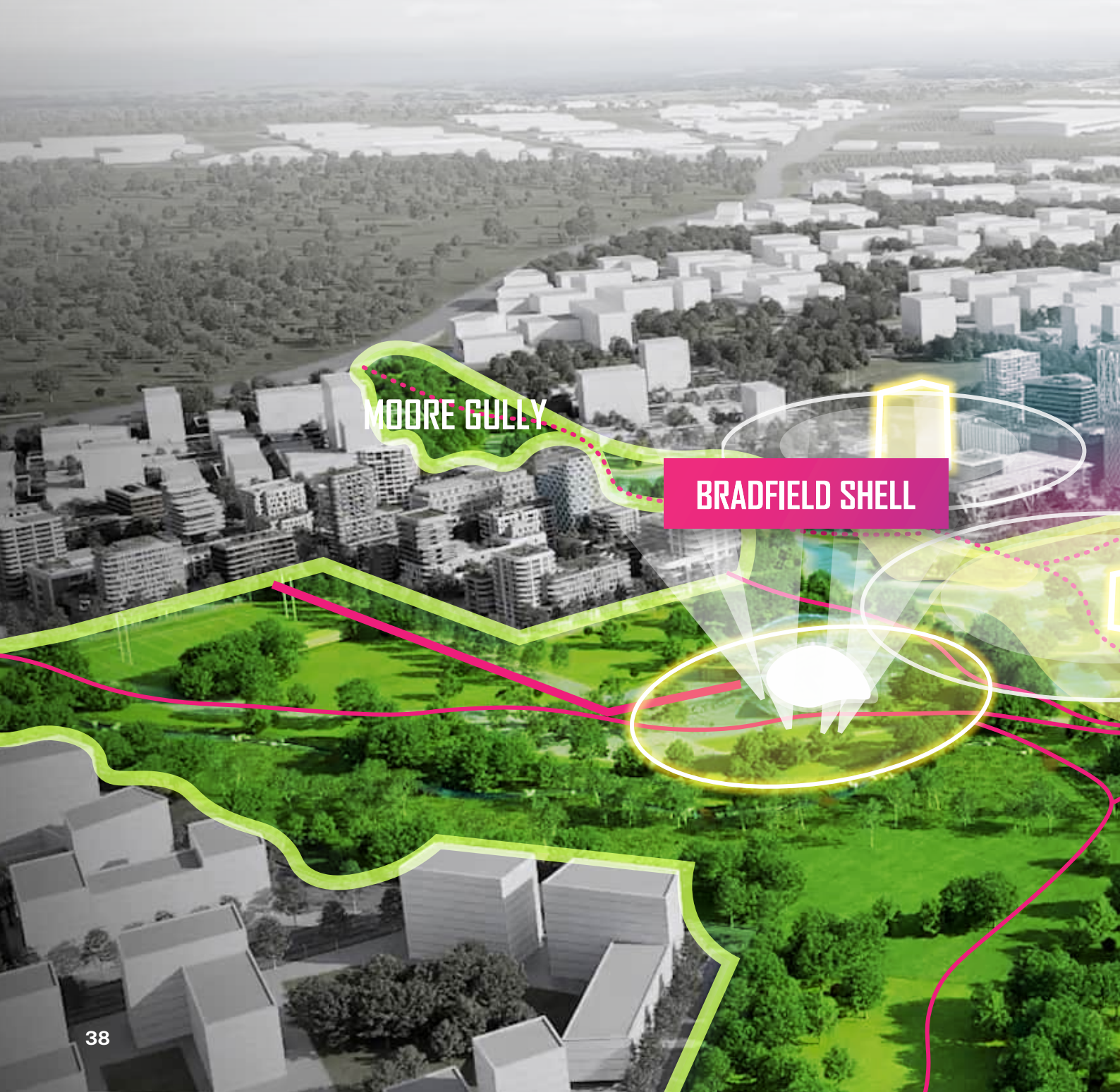
South Creek Park

The Western Parkland City is the newest of Sydney's three cities and will see the greatest change in coming decades.

The Western Parkland City is not only one of the most culturally diverse places in Australia, it is a place of economic opportunity with a population set

to nearly double by 2056, to more than 1.5 million people. It is the least served of the three cities by cultural infrastructure, and will require significant investment into its cultural offerings to ensure it develops as a livable and competitive city.

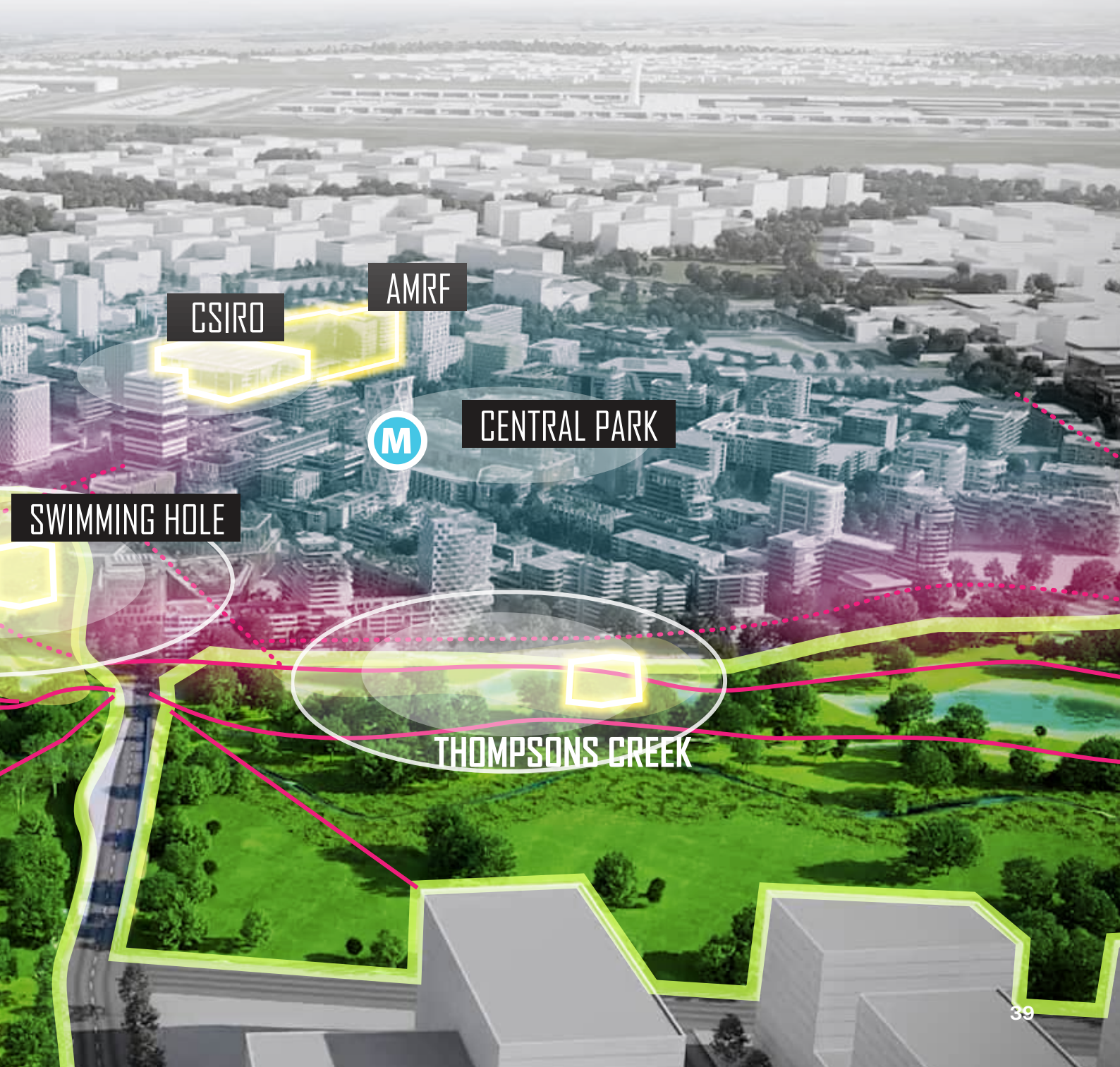
The economic engine of the Western City will be the new Western Sydney Airport and surrounding aerotropolis, including Bradfield, a new city centre with an innovation-focused economy. Supported by



fast metro connections, Bradfield is intended to be the civic, cultural and economic heart of the Western City.

South Creek Park is the Western City's city-scale parkland system, comparable to the Harbour City's Royal Botanic Gardens, Domain and Hyde Park. Equitable planning should anticipate the integration of cultural and civic infrastructure into this system to meet the demands of the growing city.

The current Bradfield masterplan already identifies a permanent outdoor event venue in South Creek Park. Located close to the heart of Bradfield, a short walk from its metro station, the Bradfield Shell will become one of the city's primary attractions. Developed in an early phase, it will be a catalyst for Bradfield's overall growth.







Set within a new park and city, the Bradfield Shell offers a blank canvas to create a remarkable venue on a largely unconstrained site.

Bradfield Shell's design can reflect the distinctive characteristics of the Western City: its natural environment, rich Indigenous culture and heritage, cultural diversity, and specialisation in emerging and technology-intensive industries. The world's first Smart Shell™ by CMG includes dragon-scaled solar panels and an extendable rain canopy to mitigate extreme weather events.

Developing Bradfield Shell is a quick win for Bradfield, providing early activation of the future city. Like Bradfield itself, the shell could evolve over time, from a light-touch early meanwhile structure to a fully permanent venue.

The Bradfield Shell will be able to host late-night events without the noise constraints impacting Sydney's other outdoor venues. A direct 24/7 connection to Western Sydney International Airport will provide access for visitors and performers from across Australia and internationally. This will make it a natural location for major outdoor concerts by international artists and one of the most competitive concert venues in the Asia-Pacific.

Economic Impact

The economic impact of the three venues for Greater Sydney.

Global research and strategy consultancy Sound Diplomacy has evaluated the economic impact of Greater Sydney's three performance shells based on global and local benchmarks. It has also forecast the potential volume of event attendees based on secondary data on the Australian live performance sector.

This considers three variables:

- **Output:** The economic value of all produced goods and services by the construction and operation of the three bandshells in Greater Sydney
- **Employment:** The number of active jobs in the production of goods and services of the construction and operation of the three bandshells.
- **Gross Value Added (GVA):** The three bandshells' output minus the intermediate consumption of the construction and operation of the three shells.

The variables are measured in two phases:

- Construction phase
- Operational phase

The study estimates the impact in terms of:

- **Direct impact:** Economic activity and employment generated directly by construction or operation of the bandshells.
- **Indirect impact:** Economic activity and employment generated by businesses supplying the construction or operation of the bandshells.
- **Induced impact:** Economic activity and employment generated by workers employed either directly or by suppliers.
- **Attendee spend:** Effect of the expenditure of attendees to performances in non-event related industries (e.g. accommodation, food & drinks, transport, retail, others).

Headlines



Construction Phase

\$350 Million Construction Cost

\$1.2 Billion Total Output Generated

4,048 Number of Employees

\$469 Million Value-Added (GVA)



Operation Phase

\$453 Million Total Output

2,362 Jobs Created

\$227 Million Value-Added (GVA)



Out-of Venue Spend

1.1 Million Attendees a Year

\$104 Million Out-of-venue Spending

217,175 Visiting Tourists

Construction Phase

The total construction cost of the three shells is estimated at \$350 Million. The total output created by the construction of the three permanent performance shells reaches \$1.12 billion, creating and supporting 4,049 employees and resulting in a total gross value added (GVA) of \$469 million.

The construction of the shells has an output multiplier effect of 3.19, which means that every dollar invested in construction will support an additional 2.19 dollars in the local economy.

	 Domain	 Parramatta Park	 South Creek Park	Total: Three Shells
Output (\$, millions)				
Direct	100	100	150	350
Indirect	123	123	184	430
Induced	96	96	145	337
Total	319	319	479	1,117
Employment				
Direct	324	324	486	1,133
Indirect	428	428	642	1,498
Induced	405	405	607	1,417
Total	1,157	1,157	1,734	4,048
GVA (\$, millions)				
Direct	32	32	48	112
Indirect	50	50	75	175
Induced	52	52	78	182
Total	134	134	201	469

Table 1. Impacts over construction phase

Operational Phase

The permanent performance shells' operation includes events production, such as concerts and arts festivals, the operation of bars and restaurants inside and outside the events, and merchandise sales.

The total output created by the three shells' operation reaches \$453 million (including direct, indirect and induced effects), generating 2,362 employees and a total GVA of \$228 million annually.

The operation of the shells has an output multiplier effect of 2.79, which means that for every dollar produced by the shells, they support an additional 1.79 dollars in the local economy.

				
	Domain	Parramatta Park	South Creek Park	Total: Three Shells
Output (\$, millions, annual)				
Direct	61	48	53	162
Indirect	52	40	44	136
Induced	59	45	51	155
Total	172	133	148	453
Employment				
Direct	432	313	383	1,128
Indirect	225	177	188	589
Induced	243	190	211	645
Total	900	680	782	2,362
GVA (\$, millions, annual)				
Direct	30	24	26	80
Indirect	25	19	21	65
Induced	32	24	27	83
Total	87	67	74	228

Table 2. Annual impact during operational phase

Operational Phase - Attendee Spend

In addition to the economic effects based on the shells' construction and operation, we estimated the impact of the audience spending outside the venues, which generates an additional effect on the local economy.

It is estimated that the three shells will host 1.1 million attendees a year, whose out-of-venue spending associated with their attendance will reach \$104 million annually. This is equivalent to a spend of \$94.54 per audience member including accommodation, transport, and food & drink associated with a visit to an event.

Furthermore, the shows produced in the three venues will attract 217,175 non-local attendees annually (from outside the Greater Sydney area) injecting \$45 million into the local economy through their out-of-venue spending.

	 Domain	 Parramatta Park	 South Creek Park	Total: Three Shells
Total Attendees				
Attendees	432,901	320,024	343,918	1,096,843
Out-of-venue spending (\$, millions, annual)	41	30	33	104
Non-Local Attendees				
Attendees	85,174	63,365	68,096	216,635
Out-of-venue spending (\$, millions, annual)	18	13	14	45

Table 3. Annual attendee spend impacts

Conclusion

This proposal presents a groundbreaking cultural infrastructure project for Australia, that is among the most ambitious of its kind in the world.

By revitalising Greater Sydney's cultural and entertainment offerings and night-time economy, performance shells in The Domain in Eastern Harbour City, Parramatta Park in Central River City and South Creek Park in Western Parkland City will have a transformative effect on Sydney's cultural, creative and night-time economies, helping Sydney reposition itself as a global leading culture and entertainment hub while delivering broader social value.

The ambition of the Shells far exceed comparable venues in Australia in terms of their high profile location, scale, design and potential for positive impact. They will also rival leading global outdoor venues including the Rady Shell.

At an estimated cost of only \$350 million, the shells will generate \$453 million additional output across Greater Sydney every year, plus a further \$104 million in out-of-venue spending, representing an exceptional public return on investment.

Maximising social and environmental benefits will be at the core of how the shells are designed, delivered and operated. This will include commitments to Sustainability and Net Zero emissions, broadening access to arts and culture, showcasing Indigenous cultural expression, partnership with the community and training and employing local residents.

With support from Government, the three shells can be delivered quickly and be ready for Sydneysiders to enjoy by the mid-2020s.

The history of the Sydney Opera House shows the transformative impact that cultural infrastructure can have on our city. As Greater Sydney undergoes a period of unprecedented change, now is the time deliver the next generation of cultural infrastructure: Greater Entertainment for Greater Sydney.





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