

ON DISPLAY



Public Exhibitions at:
The Perth Zoo
The WA Museum
The Art Gallery of WA

Performance Examination

Report No 1 – April 1997



A U D I T O R G E N E R A L

Western Australia



A U D I T O R G E N E R A L

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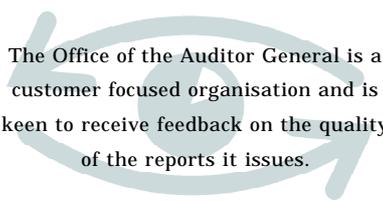
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Performance Examination

ON DISPLAY

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The Perth Zoo

The WA Museum

The Art Gallery of WA

Report No 1 – April 1997



AUDITOR GENERAL

Western Australia

**THE SPEAKER
LEGISLATIVE ASSEMBLY**

**THE PRESIDENT
LEGISLATIVE COUNCIL**

PERFORMANCE EXAMINATION — ON DISPLAY

This Report has been prepared consequent to examinations conducted under section 80 of the Financial Administration and Audit Act 1985 for submission to Parliament under the provisions of section 95 of the Act.

Performance examinations are an integral part of my overall Performance Auditing Program and seek to provide Parliament with assessments of the effectiveness and efficiency of public sector programs and activities, thereby identifying opportunities for improved performance.

The information provided through this approach will, I am sure, assist Parliament in better evaluating agency performance and enhance Parliamentary decision making to the benefit of all Western Australians.

A handwritten signature in blue ink, appearing to read 'D D R Pearson'.

**D D R PEARSON
AUDITOR GENERAL**

April 9, 1997

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Executive Summary

Background

Zoos, museums and art galleries are guardians of our natural history and cultural heritage. In Western Australia, the Zoological Gardens (the Zoo), the Western Australian Museum (the Museum) and the Art Gallery of Western Australia (the Gallery) have been undertaking that role for a hundred years.

These traditional agencies are facing a world of very rapid change. In the face of competition from other forms of entertainment, visitor numbers show a fall in attendances for each agency between 1992 and 1996. While the trend for all venues is now more positive, the challenge to maintain community support against mounting competition remains.

The level of visitor numbers is not simply a commercial concern for these venues. Their ability to meet core objectives of enhancing the community's understanding of its cultural base and, in some cases, changing community behaviour requires them to reach as many people in the community as possible. The support of the current community will also ensure that the venues are able to continue their conservation role which will meet their obligations to future generations of Western Australians.

Fundamental to maintaining and expanding community support is ensuring that their exhibitions are appealing to the public. This requires a marketing approach whereby the venues know who their visitors and potential visitors are, what they need or want from recreational venues, and how those needs can be met within the context of the venues' educational and conservation role. Each of the agencies recognise the importance of this approach.

Overall Findings

The examination found that the Zoo has developed a thorough understanding of its visitors and non-visitors through effective market research that has directly contributed to exhibition development. While both the Gallery and Museum have an understanding of their visitors based on available data and community consultation, they would benefit from more integrated market planning supported by broad-based and comprehensive visitor and non-visitor information.

Executive Summary

The Zoo's commitment to marketing as a means of expanding its community reach is further illustrated by the extent of its formal planning for marketing. While the Gallery has a marketing plan, it is limited and has not been formally endorsed and adopted by the organisation. The Museum has no overall marketing plan and see its development as a priority.

Central to the provision of visitor service is ensuring that visitors have access to the exhibits at times that are suitable and in a form that maximises the community's use of the facilities. All three venues have operated on traditional opening hours for many years, rather than on known visitor preferences. While all three agencies recognise that they could benefit from more flexible opening hours, only the Zoo has amended daily opening hours as a result of recent visitor information

All three agencies have acknowledged the value of new and emerging technology to enhance exhibits and expand public access to them. However, only the Museum has included significant technological developments in its strategic planning.

Both the Museum and the Zoo are in the process of undergoing substantial capital development of their facilities and the Gallery has also indicated a need for some improvements. These redevelopments reflect a significant level of community financial support that places an obligation on the agencies to enhance and expand public access.

Each agency is seeking to reduce its reliance upon government funding. While all three agencies have been working towards achieving this objective, only the Zoo has incorporated specific targets for financial self-sufficiency into its strategic planning.

In the development of exhibits, there is potential for cooperative marketing. Both the Gallery and the Museum have operated largely in isolation from each other which may have denied both the chance to 'feed off' each other in developing exhibits and increasing visitor numbers. Recent developments suggest a more cooperative approach between these two closely located and allied venues.

In addition to common opportunities, the Gallery and Museum also face a common problem. The cost of insurance presents an obstacle to bringing major exhibitions to Perth from interstate or overseas. Most other States

Executive Summary

have addressed this issue by the establishment of a State Government Indemnity Scheme whereby the government will provide the insurance cover for the visiting exhibitions.

Summary of Recommendations

- **The Gallery and Museum should set specific targets for increasing financial self-sufficiency. These targets should include:**
 - ❑ **planned government: other source funding ratios;**
 - ❑ **timetables for implementation; and**
 - ❑ **intended sources of other funding.**
- **The Gallery and Museum should further develop their market planning, linking it to agency-wide strategic planning. A marketing plan should be developed which:**
 - ❑ **is endorsed by the Board of the agency;**
 - ❑ **contains strategic (next three to five years) and operational (current year) components;**
 - ❑ **provides for the collection of comprehensive visitor and non-visitor market information;**
 - ❑ **has specific measurable targets; and**
 - ❑ **contains budgetary information.**
- **All three agencies should review current opening hours, using current and future customer and visitor data to identify optimum opening times. Any changes should be trialed for sufficient time to enable customer visiting habits to change in accordance with new opening times.**
- **The Gallery and Museum should investigate opportunities for more cooperative marketing between themselves and with other organisations in their marketplace.**
- **The Government should consider the establishment of an indemnity scheme to cover visiting exhibitions to Western Australia to ensure that insurance costs do not prevent the Western Australian community from having access to significant international exhibitions.**

Introduction

Zoos, museums and art galleries are guardians of our natural history and cultural heritage. They are not only important to the community they serve but frequently have far wider significance.

Throughout the world national and provincial art galleries and museums are major institutions and in some cases are considered national icons. For example, the Louvre in Paris and the British Museum in London hold collections that are important not only to the people of France and the United Kingdom, but significantly contribute to the understanding of European history and culture.

Zoos represent an important method of preserving animal species, both by physically housing them and assisting breeding and by enhancing the understanding of the community, both local and international, of the needs of the animals and of the impact of human actions on the animals and their environment.

All governments support these institutions. Every Australian state has a museum and art gallery supported by public funds, and most states have publicly funded zoos.

The continued public funding of these institutions represents a long standing community commitment. They were very significant scientific, academic and recreational venues last century and they continue to be so today. Their vital conservation function makes it essential that these cultural venues continue to play a significant role in the future.

Their ongoing financial support means that the agencies have an obligation to both the current community as well as to future generations.

The Agencies

In Western Australia, the functions of conserving our cultural and natural heritage for future generations is largely undertaken by three agencies:

- the Perth Zoo (the Zoo);
- the Western Australian Museum (the Museum); and
- the Art Gallery of Western Australia (the Gallery).

Introduction

In addition to their conservation role, each of these agencies includes in its mission a role of enhancing current community knowledge and understanding of our heritage.

The achievement of these objectives depends upon the cultural venues having a wide community reach. To be effective, the agencies must work towards increasing the awareness of as many people in the community as possible of their programs and positive attitudes to those programs must be developed. All of these venues rely heavily on public exhibitions to raise community awareness.

All three agencies occupy prime central locations, with the Zoo being on 19.5 hectares in South Perth and the Gallery and Museum occupying sites in the Perth Cultural Centre in Northbridge. The Museum is a highly decentralised organisation with eight sites, including five in the metropolitan area, although its primary site is at the Cultural Centre. While the Gallery also has two small sites in regional centres, the central Gallery is its major site.

Their exhibition role places the cultural venues within the entertainment and recreational market. They must compete against other recreational pursuits in order to attract visitors who have a real choice of where they invest their recreational time and money.

The recreation market grows more competitive each year with the development of national sporting competitions and increasingly sophisticated entertainment technology. It is therefore no longer enough for the cultural venues to simply be there for those who would use them anyway. An active approach is needed to attract visitors to the cultural venues' exhibits, thereby increasing the number of people who are exposed to the messages being delivered.

Introduction

Examination Focus and Approach

The performance examination focused on the extent to which the three cultural venues have sought to increase the general public's use of, and access to, their exhibitions.

The current level of community support was assessed by:

- examining visitor numbers and participation rates; and
- analysing the level of financial support from public funds.

The examination also sought to determine how the agencies are positioning themselves in their competitive environment. This involved determining:

- how well the agencies understood their visitors and non-visitors; and
- whether specific issues of enhancing and increasing visitor access to exhibitions had been considered by the agencies.

The examination included:

- background research on issues facing exhibiting venues worldwide;
- the collection and analysis of quantitative visitor and financial data;
- detailed review of agency planning and marketing documentation; and
- a series of structured interviews with senior managers within each organisation.

A marketing consultant was engaged to assist the examination.

The examination did not include an appraisal of the efficiency or effectiveness with which agencies undertook their conservation role. Nor was the quality of each agency's general and special exhibitions assessed.

The Current Environment

Conclusion

The Zoo, Museum and Gallery are traditional recreational venues operating in a world that is seeing very rapid change. Their exhibitions face mounting competition within the leisure and entertainment industry.

In the face of this competition, actual visitor numbers reflect a fall in attendances for each agency between 1992 and 1996 but a more positive trend is developing. Despite encouraging signs, the challenge to maintain community support remains.

The success of their exhibitions is fundamental to the capacity of the agencies to maintain and develop the community's support for their conservation and heritage role.

Competition in the Recreation Market

The Zoo, Museum and Gallery are long established Western Australian institutions. Each of the agencies has either recently celebrated its centenary or, in the case of the Zoo, will do so in 1998.

Each of the agencies has a traditional place in the leisure market, but the environment in which they are operating is changing rapidly and is becoming increasingly competitive.

The exhibiting agencies now have to compete with a resurgence in cinema-going, the emergence of high profile well promoted sporting events, the development of technological entertainment and other leisure attractions.

- Cinema attendances are increasing worldwide.
- National and international sports are gaining in popularity. More sport is being watched on television.
- New leisure technologies are increasingly being used throughout the community and have had a substantial impact on recreational habits, particularly of the young.
- Education-through-recreation and adventure attractions have emerged, such as Underwater World, Scitech and Adventure World.

The Current Environment

The level of increased competition is illustrated by the Australian wide attendances at cinemas and Western Australian attendances at Australian Football League (AFL) football (Figures 1 and 2).

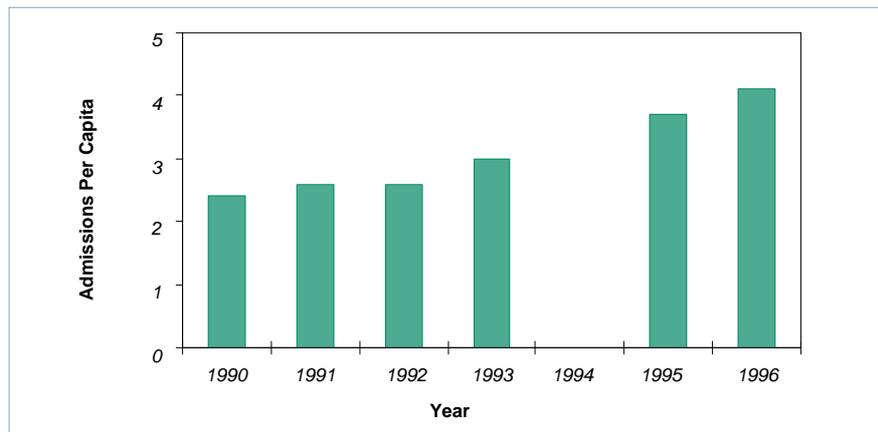


Figure 1: Cinema Admissions Per Capita (Australia wide)

Australian cinema attendances per capita have nearly doubled in the six years from 1990 to 1996, reflecting their increasing popularity as entertainment and recreational venues.

Note: Figures for 1994 unavailable

Source: Australian Film Commission

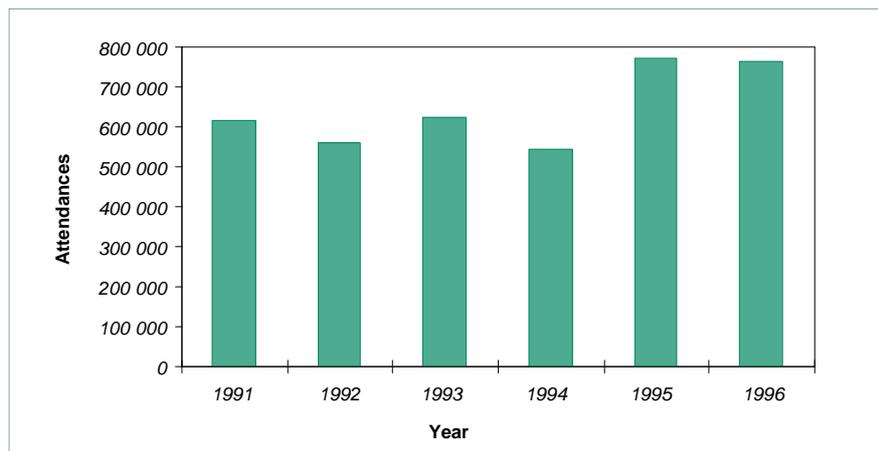


Figure 2: Attendances at AFL Football (Western Australia)

While there are ebbs and flows in attendances, the Western Australian AFL has seen an approximate 25 per cent increase in attendances over the five years from 1991 to 1996.

Source: Western Australian Football Commission

The Current Environment

Attendances at Cultural Venues

Despite the level of competition, the number of Western Australians, interstate and international visitors who attend the State's three cultural venues continues to be significant. In 1995–96, the agencies reported a combined total of over 1.6 million visits, although this figure does include an unknown number of multiple visits. The Museum reported about 750 000 visits, the Zoo about 550 000 and the Gallery about 350 000.

The published attendance figures for each agency show a slight fall in actual visitor numbers for the Gallery and Museum and a larger fall for the Zoo over a five year period (Table 1). However, when adjusted for peaks and troughs, the trend for the Museum has shown a slight increase in per capita attendances, with the Zoo trend showing a slight decline. The Gallery has maintained its 1992 visitor levels. (Figure 3) Current figures indicate that the improvement for each agency during 1995–96 is likely to continue in 1996–97.

	Zoo	Museum	Gallery
1991–92	632 861	752 000	352 218
1992–93	612 866	626 000	300 437
1993–94	575 553	743 959	353 194
1994–95	545 437	787 373	325 281
1995–96	548 672	745 000	343 986

Table 1: Actual Visitor Numbers 1992–96

The actual visitor numbers show a slight fall in visitor numbers for the Gallery and Museum and a larger fall for the Zoo over a five year period.

Source: Agency Annual Reports

The Current Environment

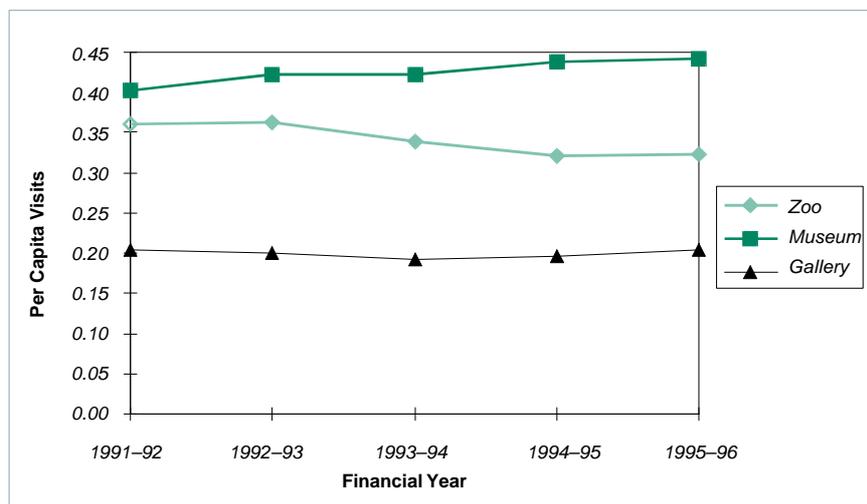


Figure 3: Per Capita Attendances 1992-96 (Moving Average)

On the basis of a moving average which reduces the impact of peaks and troughs the Museum has seen a slight increase in visitors per capita, the Zoo has seen a slight decline and the Gallery has remained at 1992 levels. Current figures indicate that the improvement for each agency during 1995-96 are likely to continue in 1996-97.

Source: Agencies and the OAG

Attendance comparisons made between these agencies should be treated with caution, however, because:

- attendance data will vary according to whether or not there is an admission fee and according to the level of that fee;
- figures based on gate receipts are likely to be more accurate; and
- the Museum is a highly decentralised organisation, and the central site in Francis Street accounts for only 36 per cent of its visitors. Some of its sites are quite specialised or cater for a particular region and thus visiting patterns may vary between sites. While the Gallery has two regional galleries, the majority of its visitors are to the Perth Gallery.

The Zoo has a general admission fee for all visitors while the other two agencies only charge some of their visitors through special exhibitions. The Zoo captures all visitor numbers through gate receipts. The Gallery and Museum’s numbers are derived from a combination of receipts for special exhibits and estimates of unticketed entries.

The Current Environment

National attendance trends suggest that the Western Australian venues are doing reasonably well. Independent research conducted by the Australian Bureau of Statistics (ABS) indicates that art galleries and museums across Australia have experienced a general decline in visits during the period 1991 to 1995 (Figure 4). The ABS data refers to all art galleries and museums, not just the State institutions. Zoos and wildlife parks were not included in the 1991 survey and therefore no comparative figures are available.

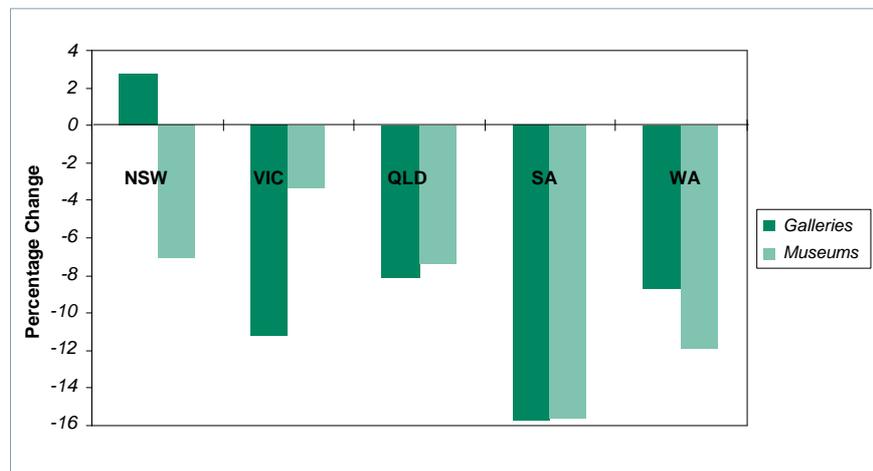


Figure 4: National Change in Attendances 1991–95 for Museums and Art Galleries
ABS data indicates that art galleries and museums across Australia have experienced a general decline in visits during the period 1991 to 1995.

Note: Data applies to all art galleries and museums, not just the State institutions. ABS data are based on the percentage of the population over 15 years of age who have attended either an art gallery or a museum at least once during a particular year.

Source: ABS Catalogue 4114.0 (1991 & 1995)

The success of exhibitions cannot be judged solely by the number of visitors but this measure is a key indicator of the level of community interest and support.

The Current Environment

At the Zoo and Museum, exhibitions were seen until relatively recently as secondary, an obstacle to getting on with the 'real work' of conservation and research. This attitude is changing. Exhibitions are now seen as the key means of demonstrating agency relevance to the community and arresting erosion of community support in the future. Exhibitions have always been the Gallery's primary activity.

The new attitude is illustrated in the Zoo's visitor guide which states:

“The front gate of the Zoo is our life blood...ensuring the work of your Zoo will continue into the 21st century.”

Agency Funding

Conclusion

All three agencies have received significant ongoing financial support from the community through successive governments.

Each has an objective of reducing its reliance upon government funding. All three agencies have been working towards achieving this objective, with the Zoo making the most progress due largely to its charging of a general admission fee.

The Zoo has incorporated specific targets for financial self-sufficiency into its strategic planning.

Background

The community, through successive governments, has provided continuing financial support to the three cultural venues for about 100 years. While the risk of totally losing government financial support may be low, the level of support provided may vary for a number of reasons, including how successful the agencies are seen to be in serving the many diverse needs of the Western Australian community.

The increasing trend within Australia and other Organisation for Economic Cooperation and Development countries is to link funding to performance delivery rather than historical precedent. The introduction of Output Based Management (OBM) across the Western Australian public sector in 1997 will further reinforce this link between the level of government funding and agency's delivery of outputs that meet desired outcomes for the community.

Agency Funding

Funding Arrangements

The 1996 funding arrangements are summarised in Table 2.

	Consolidated Fund Contribution \$	Revenue from Services \$	Total \$
Zoo	3 928 000	3 850 384	7 778 384
Gallery	5 459 391	1 870 345	7 329 736
Museum	9 440 000	2 400 000	11 840 000

Table 2: Funding Arrangements 1995–96

All three agencies receive strong and on-going support from the State Government through the budget.

Source: Agency Annual Reports

Over the past five years, the Zoo has seen a real decline in the level of budgetary support, as illustrated in Table 3. This partly reflects the Zoo's capacity to improve its own revenue base through a general admission charge. The Gallery and the Museum have seen an increase in government funding over the five year period.

	Zoo \$	Museum \$	Gallery \$
1991–92	4 451 700	9 078 060	4 825 173
1992–93	4 252 311	9 206 561	5 149 802
1993–94	4 195 295	9 333 376	5 334 663
1994–95	3 834 912	9 726 600	5 624 941
1995–96	3 928 000	9 440 000	5 459 391

Table 3: Consolidated fund contributions (constant 1996 dollars)

In real terms, the Zoo received 12 per cent less from the Consolidated Fund in 1996 than it did in 1992. The Museum saw an increase of 4 per cent and the Gallery a 13 per cent increase.

Source: Agency Annual Reports and OAG

Agency Funding

To provide a performance-based context to government funding to the agencies, it is useful to express the appropriations on a dollar per visitor basis. Table 4 shows that while the increase in the Zoo's Consolidated Fund appropriation per visitor is not as significant as that for the other agencies, falling attendances have meant that it is getting marginally more per visitor than it was in 1991–92. Both the Gallery and Museum show increases in real contributions per visitor from the Consolidated Fund.

Year	Zoo CF\$ Per Visitor	Museum CF\$ Per Visitor	Gallery CF\$ Per Visitor
1991–92	7.03	12.07	13.70
1992–93	6.94	14.71	17.14
1993–94	7.29	12.55	15.10
1994–95	7.03	12.35	17.29
1995–96	7.16	12.67	15.87

Table 4: Consolidated fund contributions per visitor (constant 1996 dollars)

Despite a smaller budgetary contribution over the five year period, the Zoo is still receiving marginally more per visitor than it was in 1991–92. Both the Museum and the Gallery are also receiving more budget funds per visitor.

Source: Agency Annual Reports and OAG

All three agencies have an objective to reduce the level of government funding as a proportion of total funding by increasing their own sources of revenue. Table 5 shows that all three agencies have been working towards achieving this objective, with the Zoo making the most progress.

Agency Funding

	Zoo % CF/Total	Museum % CF/Total	Gallery % CF/Total
1991-92	64	81	87
1992-93	62	87	85
1993-94	61	85	88
1994-95	60	84	82
1995-96	50	81	78

Table 5: Trends in Reliance on Government Funding 1992-96

The Zoo has been progressively reducing the proportion of its revenue that comes from the budget over the five year period. The Gallery and Museum have been reducing the percentage in recent years.

Source: Agency Annual Reports and OAG

The Zoo's Business Plan has established a target ratio of 35:65 government : non-government funding by the Year 2000, a figure that equals the Australian national zoo benchmark. While identifying increased financial self-sufficiency as an objective in their strategic plans, neither the Gallery nor the Museum have established any specific targets. The Zoo, by identifying the national benchmarks in a number of financial categories has given itself and the Parliament a basis for measuring key components of financial performance.

Admission Charges and Commercial Operations

While it seeks to have the lowest admission fees of any Zoo in Australia, admission prices at the Zoo have risen significantly over the past five years. Recent significant increases in admission fees have not led to any dramatic fall in attendances (Figure 5).

Agency Funding

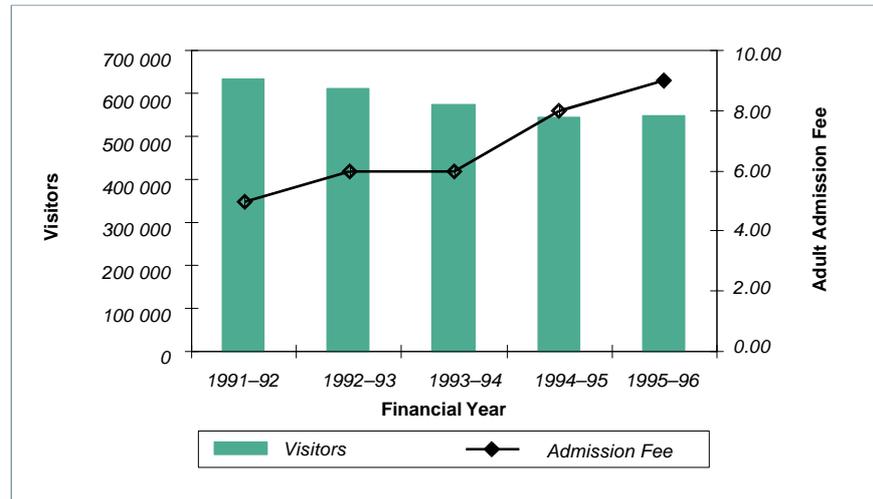


Figure 5: Perth Zoo Visitor Numbers and Admission Fees 1992-96

In order to maximise its non-government revenue, the Perth Zoo has been increasing its admission fees while maintaining its objective of remaining the least expensive Zoo in Australia. The recent significant increases in admission fees has not led to a dramatic fall in attendances.

Source: Perth Zoo Annual Reports

The Zoo's increases in admission fees were part of the strategic business plan developed in 1994. The increases followed a long period without significant fee revision and the fees no longer matched those charged by other local competing venues.

Neither the Museum nor the Gallery charge a general admission fee, both seeing free access to their general collection as being important to the achievement of their respective missions. The Gallery has also expressed a concern that a general admission fee would result in a substantial decline in attendances.

Despite not having a general admission fee, both the Gallery and the Museum charge for some visiting or special exhibitions. The Gallery charges between \$6 and \$10 for special exhibitions, depending on their likely popularity. This form of income is becoming increasingly important to the Gallery. In 1995-96, the revenue from special exhibitions was about \$780 000, which represented nearly 42 per cent of the total revenue from services. This was an increase from 21 per cent the previous year. Visiting

Agency Funding

or special exhibitions represent a way of both meeting the Gallery's mission of bringing the art of the world to the people of Western Australia, and of providing valuable income.

While the Museum does consider that visiting exhibitions are of value, and has increased them in recent years, it has a preference not to charge for them and does not view them as an alternative source of income.

Operating as a business is not a core function for any of the three agencies. However, the improvement of commercial performance is cited in all three agencies' strategic plans as an important way of reducing their reliance on taxpayer funding and increasing their capacity to achieve their goals.

The Gallery, in particular, has improved its commercial performance through a revamping of its shop. The Gallery Bookshop has been established as a major art bookshop and now serves not only patrons of the Gallery but anyone interested in art and related subjects. This has led to a dramatically increased profit from just under \$6 000 in 1994–95 to nearly \$90 000 in 1995–96. A similar improvement has been seen in the Zoo's souvenir shop as it has been substantially redeveloped.



The Gallery Bookshop now serves not only patrons of the Gallery but anyone interested in art and related subjects with a dramatically increased profit from just under \$6 000 in 1994–95 to nearly \$90 000 in 1995–96.

Agency Funding

The Museum has recognised the advances made by the Gallery through its bookshop and has engaged the same consultant to redevelop and manage its own shop. In addition, the Museum and Gallery are now investigating the possibility of operating their shops together, with joint buying and promotion.

The Museum has also identified cultural tourism as a commercial opportunity. It has established a partnership with a resort in which the Museum provides its scientific skills and uses the Museum as an orientation site for tourists prior to their going to the Karri Valley. It is also running tours out of Geraldton to the Abrolhos Islands as part of its cultural tourism program.

Recommendation

- **The Gallery and Museum should set specific targets for increasing financial self sufficiency. These targets should include:**
 - ❑ **planned government : other source funding ratios;**
 - ❑ **timetables for implementation; and**
 - ❑ **intended sources of other funding.**

Understanding Visitor Needs

Conclusion

Understanding the customer is a critical piece of information for any organisation. In the case of the cultural venues, their most significant customer groups are their visitors and potential visitors.

The Zoo has undertaken comprehensive and systematic market planning, which has included detailed market research and has developed an understanding of its visitors and non-visitors. As a result of this, exhibitions have been developed to meet the needs of specific markets.

While both the Gallery and Museum have an understanding of their visitors based on available information, they would benefit from more integrated market planning supported by broad-based and comprehensive visitor and non-visitor information.

Background

Exhibitions remain the most significant means by which the cultural venues convey their message to the community. Ensuring that exhibitions provide visitors with a positive experience is fundamental to the agencies successfully delivering their message and to maintaining community support. In order to achieve this, they must:

- develop top down organisational support for a visitor focus;
- know who their visitors and potential visitors are;
- know what exhibits different types of visitors (market segments) want to see, and what services and standards they expect; and
- implement strategies to meet visitor needs and monitor reaction.

Such an approach will do more than bring people through the door. It will assist the agencies to firstly broaden their appeal to the wider community and then target particular exhibits or exhibitions to broad market segments. This will increase the impact of their educational and conservation messages.

Understanding Visitor Needs

Developing this visitor focus is assisted by a marketing plan, which outlines where an organisation is at present, where it wishes to be in the future and how it intends to get there. In addition to giving strategic direction, a marketing plan forms a basis for on-going operational decisions. The marketing plan should also be supported by a budget, which serves to demonstrate commitment, as well as being a management tool.

Market Planning

The Zoo has produced a marketing plan based on historical data and comprehensive market research conducted among key target segments during early 1996. It was developed in consultation with a wide range of staff and sponsors, and acknowledges the role of other Zoo programs in ensuring the plan's success.

The Zoo's plan is a blend of strategic and operational elements which include:

- an analysis of the strengths, weaknesses, opportunities and threats facing the organisation. These included identifying the markets that they have captured and the ones that they need to work on, inadequacies of facilities and services, and areas that may provide a specific increase in visitor numbers and satisfaction such as Night Zoo, concerts, more flexible opening hours;
- the identification of key strategies including the importance of visitor research, strategic industry alliances and product development; and
- the allocation of specific timeframes, budgets, outputs and desired outcomes for all organisational activities.

The Zoo has allocated an estimated four percent of its 1996–97 operating budget to marketing.

The Zoo's marketing plan is consistent with its 1995–2000 Business Plan objectives and proposed actions, which in turn flow from specific objectives in the corporate plan contained in a 1990 Master Plan. The strategic planning process at the Zoo is well developed and has been in place for some time.

Understanding Visitor Needs

The Night Zoo

As a direct result of its quantitative and qualitative research, the Zoo has trialed Night Zoo, combining the natural attractions of the venue with additional entertainment. February is traditionally a poor month for the Zoo due to the heat. During February 1997, the Zoo has opened on four consecutive Saturday nights with free staged concerts. The last of the concerts was extremely well supported, with 7 300 people attending for the day and more than 4 600 arriving after 4.30 pm. This suggests that many of the people attending were attracted specifically by the night time entertainment. As a result of the Night Zoo experiment, the 35 000 visitor target for February had been exceeded by more than 7 000 in the week prior to the end of the month. The Night Zoo has clearly been successful in overcoming a seasonal downturn problem and is a positive example of good planning based on sound visitor information.

The Gallery has developed a marketing plan with a more limited focus on the marketing unit's specific areas of responsibility. It provides no specific financial commitment to marketing although it does include:

- some broad marketing objectives, including the promotion of the exhibition program, maintenance of visitor numbers, increasing the level of visitor enjoyment, increasing awareness of the Gallery within the community, and encouraging greater use of Gallery's facilities;
- limited visitor analysis based largely on its own internal data and ABS and Arts Council data;
- a description of the structure, functions and activities of the marketing department; and
- support for the operational market plans prepared for individual exhibitions.

During interviews some key managers at the Gallery indicated that they were unfamiliar with the marketing plan. A plan that takes a broader Gallery-wide visitor focus and has the endorsement of senior management would assist the Gallery in developing its visitor focus.

Understanding Visitor Needs

The Museum currently has no marketing plan covering the entire Museum and, like the Gallery, has made no specific financial commitment to its marketing effort. The Museum's five-year strategic plan is a brief document that does not specifically address marketing strategies.

However, the Museum has identified several key strategies in its planning that form the basis of a "Public Dividend Strategy" and which provide the direction for its marketing effort. Key elements include:

- site redevelopment, with the aim of repositioning the Museum in the eyes of the community;
- product development, including a strategy of redeveloping all exhibits within five years and increasing commercially viable travelling exhibitions. The exhibition redevelopment excludes those displays with a declared heritage value;
- development of information technology to expand the Museum's reach and enhance its exhibits;
- publicity and advertising, including strategic partnerships with media organisations;
- further developing sponsorship through the Museum foundation;
- further develop community input into exhibits, with a specific program to develop major market segments within the ethnic migrant community and the Aboriginal community; and
- undertake more comprehensive visitor surveys and market research.

The development of more comprehensive visitor and non-visitor information, based on broad-based market research, is an essential pre-requisite for the successful implementation of the other strategies.

The Museum recognises that the absence of a marketing plan is a limitation to visitor development. The development of an organisational wide marketing plan is seen by the Museum as a key priority to be undertaken in conjunction with the re-development of the Museum's new facilities.

Understanding Visitor Needs

The attitudes of key people interviewed at the three agencies are generally positive towards marketing. The importance of the visitor is acknowledged by all three agencies, with each agreeing that *'our business is dependent on a long term relationship with our visitors'*. Marketing is seen as an important tool to assist in developing that long-term relationship.

At the Zoo, activities that interface with the public are grouped into one Division, Visitor Services. While specific marketing staff number three, this entire division performs a marketing function. There is a good level of understanding for and/or commitment towards marketing among the senior management people interviewed, and strong support from the Chief Executive Officer. This commitment is illustrated by the nomination of the division that undertakes marketing as one of the three most influential sections within the organisation.

At the Museum, the marketing function is located within the Public Programs Division, which was nominated as one of the organisation's key influential sections. Although there are few staff specifically responsible for marketing, many of this division's staff perform marketing functions.

At the time the performance examination commenced the marketing function at the Gallery was placed within the Exhibitions and Development Division. While the organisational structure did not necessarily reflect less commitment to marketing, during interviews it was not mentioned as one of the top three influential centres within the Gallery. Further, at an exhibition level, marketing had not been involved at the development phase — the Marketing Manager had not been included in the regular program meetings at which exhibitions were planned. This suggested that marketing had been used as a means to promote and advertise rather than as a fundamental part of exhibition development.

During the course of the performance examination, substantial changes have taken place at the Gallery. The restructuring of the Gallery has replaced the previous organisational structure with two key functional cells, called the Exhibition Logistics Cell and the Marketing Revenue Services and Access Cells.

Understanding Visitor Needs

The Marketing Manager will now report direct to the Chief Executive Officer who will have strategic responsibility for both the Marketing and Revenue Services and Exhibition Logistics Cells. These changes are designed to encourage a more team-based approach to the Gallery's operations and are likely to make marketing an integral part of the Gallery's operation. It should remove the isolation that has characterised its marketing function in the past.

Information on the Visitor

The educative role of these agencies requires them to do more than merely reflect current public tastes. In order to achieve their goals they will at times present exhibits that are not the result of direct public demand. However, to be successful they need to stimulate interest by being seen as relevant and important to the community. It is therefore vital that they understand their market and tailor their activities to appeal to as many people as possible.

All businesses have existing customers, potential customers and non-potential customers, as do most government service providers. Understanding the customer is a critical piece of information for any organisation. In the case of the cultural venues, their most significant customer groups are their visitors and potential visitors. It is essential for them to have sufficient information on both current visitors and potential visitors to be able to identify, segment and target key customer groups. In order to do this, market information should

- provide profiles of differing visitor groups;
- identify how often visitors attend the venues;
- ascertain whether they have been satisfied by their experience; and
- identify what changes would enhance their enjoyment of future visits.

Understanding Visitor Needs

There are a number of ways to obtain market information including:

- comprehensive qualitative and quantitative market research within the wider community;
- surveys of visitors to the venues;
- the use of customer councils and community-based advisory committees; and
- informal consultation with community groups and members of the public.

Research and surveys that focus on the wider community provide information not only on people who visit the venues, but also on those who do not. They assist the agencies to both retain current visitors and attract new ones. The value of this information depends upon its reliability and detail.

Telephone and face-to-face interviews are a reliable way to survey visitors and potential visitors because they enable the interviewer to further clarify a person's response and therefore provide better qualitative data. By contrast, self-administered survey based on questionnaire forms do not provide the same level of information.

Self-administered surveys do have some value to an organisation. They show visitors that their views matter and send a message to staff that visitors' views are important. However, they provide limited and potentially misleading information because they rely on people volunteering to complete a survey form. Therefore, it is generally considered inadvisable for any organisation to base strategic or important operational decisions on the results of such surveys.

The Zoo has a substantial database that provides reliable data on its visitors. This has been developed from ongoing visitor satisfaction surveys that have been undertaken since 1993 and a more recent major market research survey of visitors to the Zoo and key target groups within the general public. These surveys have been professionally conducted and involve face-to face interviews with people selected to represent a cross-section of visitors. Market research was also conducted in 1989 as input to the Zoo's master plan and is also carried out on specific exhibits such as The White Tiger Research in March 1996.

Understanding Visitor Needs

The Australian Bushwalk

The Zoo's information base has led to the development of an attraction to meet a particular market, namely the tourist with limited time but an interest in Australian animals. The Zoo is developing an Australian Bushwalk that will simulate the Australian bush. This Bushwalk will take about two hours which is substantially less time than it takes to see the whole Zoo. It will have a separate entrance and admission charge, although people will have the option of going from the Bushwalk into the rest of the Zoo.

In addition to the Australian Bushwalk, proposed developments based on the Zoo's market research include:

- the Wetlands and Cultural Centre for tourists;
- the Night Zoo for teenagers and young adults; and
- a function centre for corporate bodies.

Both the Gallery and the Museum acknowledge that they have not undertaken sufficient market research within the wider community. However, both consider that they do have a sound understanding of their current visitors and have identified certain market segments as targets for their marketing efforts.

The Gallery uses a variety of sources, including self-administered visitor surveys, ABS and Arts Council data, as well as the interaction of staff and volunteers with visitors to build up a profile of its visitors. It uses its Customer Service Council as its main forum for receiving input from the community, in addition to a complaints logging system and informal consultation through its information desk.

Further market research is now being undertaken, including a series of surveys at the Cultural Centre Plaza and surrounding areas to ascertain the level of awareness of the Gallery among people in the area. In addition, the Gallery intends to undertake more extensive market research using the resources of the ABS Outposting and Statistical Consultancy Services.

Understanding Visitor Needs

National Aboriginal and Islander Day of Celebration

The Gallery has identified aboriginal people as a potential market that needs to be further developed. As a way of achieving greater participation from aboriginal people, the Gallery now presents a week of special activities during the National Aboriginal and Islander Day of Celebration (NAIDOC) week. Aboriginal artists and youth participate in a series of interactive workshops designed to encourage Aboriginal identity and culture. While not significantly increasing the Gallery's visitor numbers, the NAIDOC week activities are designed to increase the relevance of the Gallery to aboriginal people, as well as increase public awareness of the Gallery's key aboriginal collection.

The Museum places an emphasis upon community consultation as a means of developing a clear understanding of particular market segment needs. It has targeted particular groups within the community, particularly the aboriginal and migrant communities, and has sought to consult widely with these groups. The Western Australian Museum Aboriginal Cultural Heritage Advisory Committee reviews relevant exhibits and public meetings are held in regional areas at least three times a year to enable aboriginal communities to have direct input into the Museum's activities. The advisory committee has been responsible for the redesign of the Aboriginal Gallery at the Francis Street Museum.

Ethnic Communities

Consultation with the ethnic migrant community has been central to the development of community access galleries at Fremantle History Museum through the Social and Cultural History Museums Board. The Fremantle galleries, which enable groups within the community to put on their own exhibitions with assistance from the Museum's professional staff, are booked for the next four years. All exhibits at the Fremantle site, including the Museum's own displays, are aimed at involving the community and seeking their input into exhibitions.

Understanding Visitor Needs

While the Museum has focused on community consultation, its visitor database is limited. It uses visitor questionnaires that are handed to incoming visitors who are asked to complete them when they leave. The Museum has recognised this limitation and is planning to conduct more extensive market research, in conjunction with Curtin University, later in 1997.

Both the Gallery and the Museum have been able to demonstrate that they make effective use of:

- internal visitor surveys;
- publicly available expert research and demographic data; and
- consultation with local and targeted community groups.

The knowledge that they have gained is a useful starting point for developing a more broad-based visitor focus. This focus would be enhanced by more integrated market planning supported by comprehensive visitor and non-visitor information.

Recommendation

- **The Gallery and Museum should further develop their market planning, linking it to agency-wide strategic planning. A marketing plan should be developed which:**
 - is endorsed by the Board of the agency;**
 - contains strategic (next three to five years) and operational (current year) components;**
 - provides for the collection of comprehensive visitor and non-visitor market information;**
 - has specific measurable targets; and**
 - contains budgetary information.**

Public Access To Exhibits

Conclusion

Opening hours at the cultural venues are based largely on traditional and standard times rather than on known visitor preferences. The Zoo is the only one of the agencies that has amended daily opening hours as a result of recent visitor information.

All three agencies have acknowledged the use and value of new and emerging technology to enhance exhibits and expand public access to them. However, only the Museum has included significant technological developments in its strategic planning.

Both the Museum and the Zoo are in the process of undergoing substantial capital development of their facilities and the Gallery has also indicated a need for some improvements. These redevelopments reflect a significant level of community financial support that places an obligation on the agencies to enhance and expand public access.

Background

Central to the provision of visitor service is ensuring that visitors have access to the exhibits of the cultural venues at times that are suitable and in a form that maximises the community's use of the facilities. By maximising the public's access to their exhibits, the agencies improve their own effectiveness in reaching the widest possible audience. Two issues in particular impact on access:

- the daily span and total weekly number of opening hours; and
- the use of new technologies to both enhance on-site exhibits and increase off-site access.

Access can also relate to the venues' facilities and the extent that their permanent collections are on display.

The agencies provide additional access in a variety of forms, including expanding reach through regional sites, travelling exhibitions and the loaning of items to other organisations.

Public Access To Exhibits

Opening Hours

The agencies have generally maintained traditional opening hours which have been in place for a number of years.

On a national comparison, the Zoo and Gallery open equivalent hours to their counterparts in other States. The Museum, however, is open for fewer hours than its interstate counterparts, as illustrated in Table 6. The Museum is a decentralised organisation which makes comparison between the agencies difficult. Unless otherwise stated, this section refers to the main Francis Street site.

	NSW	VIC	QLD	SA	WA
	Wkly Hrs				
Zoo	56	56	n/a	52.5	56
Museum	52.5	49	56	49	43
Art Gallery	49	52.5	49	49	49

Table 6: Interstate Comparison of Opening Hours

On an interstate basis, the Zoo and Gallery maintain national standard access hours whilst the Museum has the lowest number of weekly hours of any state museum.

The agencies opening hours are largely consistent with national and international standards, but changes to lifestyle and work practices may require the agencies to adopt more flexible opening hours. Such changes may also require a shift in the thinking of visitors. The almost universal nature of the hours may have developed in visitors and potential visitors particular attendance habits, and these may take some time to change.

The Gallery opens from 10 to 5 each day and the Zoo from 9 to 5. They do not vary their opening hours according to the day of the week. However attendance data for both agencies during August 1996 shows that visitor numbers vary considerably between weekends and weekdays (Figure 6).

Public Access To Exhibits

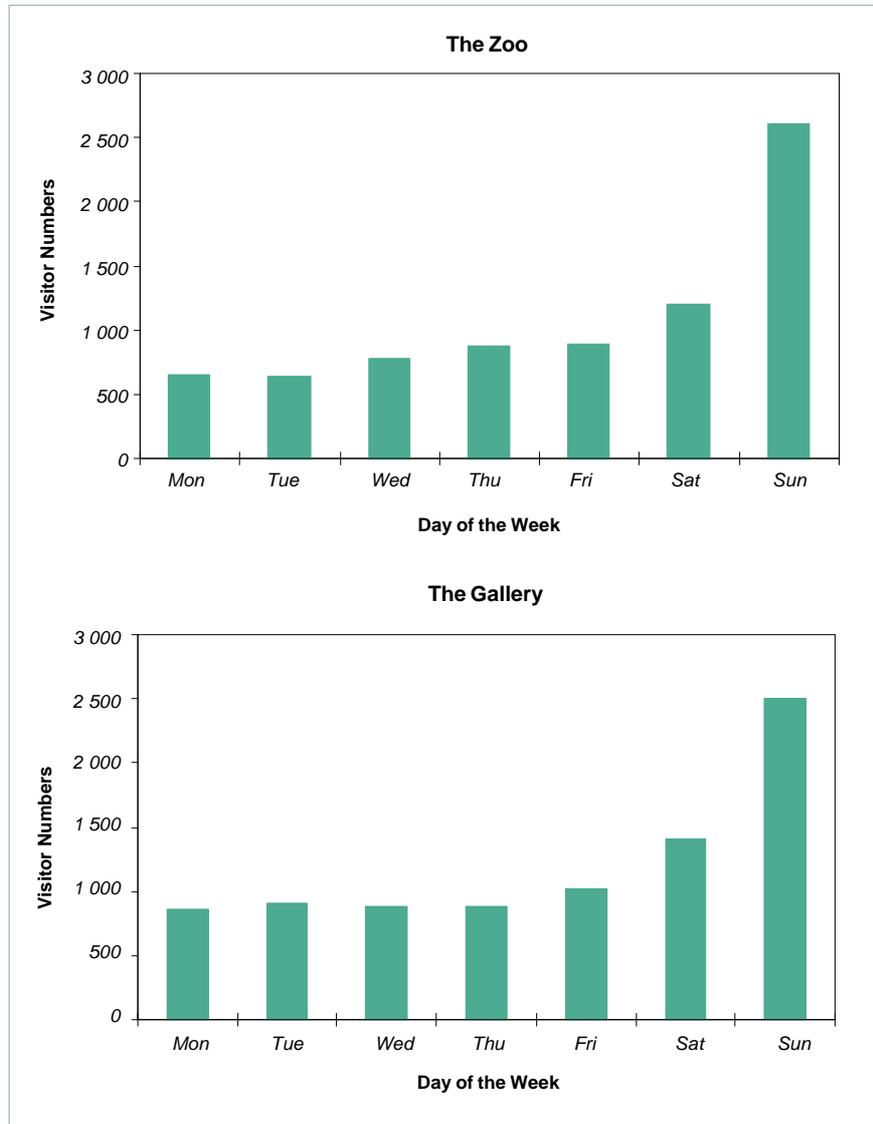


Figure 6: Daily Average Attendances for the Zoo and Gallery – August 1996

Both the Gallery and the Zoo show greater attendances on weekends that is not recognised in their opening hours. This month was selected as it did not contain school holidays which would show different use patterns.

Source: Zoo, Gallery and OAG

Public Access To Exhibits

The Museum is open to the public from 10.30 am to 5.00 pm Sunday to Friday and from 1.00 pm to 5.00 pm on Saturdays. Figure 7 shows that the spread of visitors to the Museum during August 1996 was fairly constant throughout the week with the exception of Saturday, when visitor numbers were considerably less.

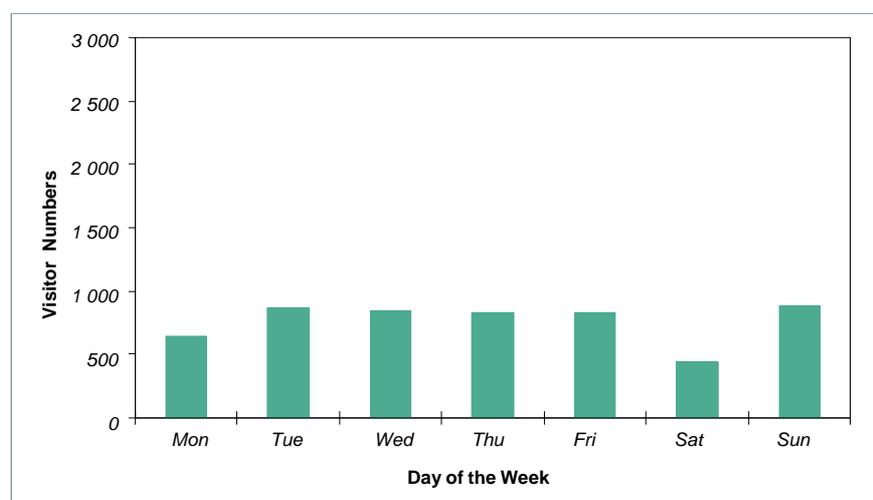


Figure 7: Daily Average Attendances for the Museum – August 1996

The spread of visitors to the Museum during August 1996 was fairly constant throughout the week with the exception of Saturday, when the Museum is only open for half the day. This month was selected as it did not contain school holidays which show different use patterns.

Source: Museum and OAG

The reduced opening hours on Saturdays have been in place for some years. Until 1993, the Museum also closed on Sunday mornings. It is the current intention to increase its hours by opening on Saturday mornings although no timetable is in place. Since 1993, across the Museum's eight sites total weekly hours have been extended from 247 hours to 276.5 hours. The majority of this increase has been at the Fremantle History Museum which has increased from 16 to 38 hours per week. It is the Museum's target to have each of the sites open for 49 hours per week.

The Museum has been trialing night openings on an exhibition-specific basis, with eight evening openings during the recent Real Wild Child exhibition. The redevelopment of Hackett Hall and the re-orienting of the Museum towards the Cultural Plaza is also expected to lead to increased night time openings.

Public Access To Exhibits

While it is recognised by the agencies that both the Gallery and the Francis Street Museum would benefit from more flexible opening hours, to date only the Zoo has made a change to daily opening times in response to identified visitor needs. From July 1 1996, the Zoo's opening time was brought forward from 9.30 to 9.00 am. This change was in response to concerns held by both the Zoo and schools that school excursions were having to wait for half an hour or more outside the gates of the Zoo before being able to enter.

Each of the agencies is currently attempting to achieve more staffing flexibility through enterprise bargaining agreements and, in the case of the Gallery, through the contracting out of certain functions.

There are efforts being made by all agencies to increase access to their venues for corporate and private functions out of normal hours.

Use of Technology

Growing public familiarity with new multi-media technology presents an opportunity for the cultural venues by:

- enhancing existing exhibits; and
- improving community off-site access.

The digitisation of the agencies' collections is central to the use of new technologies. This means the conversion of photographs and other images into a digital form useable by computers. A major example of this is the development of the Micro Gallery at the National Gallery in London. The Micro Gallery is a computerised, interactive, public access information system that provides detailed information about the Gallery's collection of paintings in an accessible form, using digitised colour images and touch screen technology.

The Museum has indicated a commitment to the digitisation of its collection through the Australia-wide Virtual Cultural Centre project and the development of a multi-media 'Discovery Centre' within the redeveloped Hackett Hall. In its Strategic Plan 1995–2000, the Museum lists increased access to collections and information as a future direction and strategy.

Public Access To Exhibits

Under that heading it commits to:

- develop an on-line public research facility as an adjunct to Museum programs;
- participate in the Virtual Cultural Centre project;
- develop a mechanism for public access to a central collection database; and
- expand a range of popular information products to include electronic media.

The Museum is also involved in Australian Museums On Line (AMOL), a project that aims to dramatically increase access to the cultural resources of Australian museums via the Internet by 2001. The AMOL world wide web site will become the 'window' into the Australian museum community – for museum workers, for the education sector and for the general public.

The Gallery is also involved in both the Virtual Cultural Centre project and AMOL. In addition, it uses some audio visual aids, such as exhibition guides on cassette and video presentations to enhance selected visiting exhibitions. However, unlike the Museum, the development of technology as a means of expanding access to, or enhancing, exhibits is not a feature of the Gallery's strategic planning.

For the Zoo's part, a recently-commissioned consultant's report has highlighted the importance of technological advances, despite a traditionally held view that animals and technology are not compatible. Examples of its uses are cited by the consultants, including the Singapore Zoo's extensive internet site which is used as an advertising and promotional medium, and San Diego Zoo's development of a CD-ROM Computer game called 'The Animals'. This game includes video clips, photos and CD quality audio of the Park's animals.

Each of the agencies has recognised the potential use of new technologies, with the Gallery and the Museum establishing Internet Home Pages. The Museum has also established a World Wide Web site at its Fremantle facility that has attracted 50 000 'virtual visitors' in the last year. This is a significant marketing and service delivery tool for the Museum. To date, however, the enhancement of existing exhibits is limited at all three venues.

Public Access To Exhibits

Whereas cost can clearly be a constraining factor, the future use of technology will be more than a peripheral activity for the cultural venues. It will become an essential vehicle for delivering their services, both on an educational and recreational level.

Facilities and Infrastructure Development

An important factor in the cultural venues capacity to provide satisfactory access to their exhibitions, and through it meet their mission objectives, is the quality of their facilities and infrastructure.

The Zoo is undergoing a substantial redevelopment, with capital expenditure of \$24 million being planned up to the year 2000. The Zoo's redevelopment plans have been in place for some years, with a Master Plan having been released in 1990. In conjunction with a firm of international zoo designers, the Zoo has developed a detailed long-term plan that is designed to make the Zoo more attractive to visitors and to improve the well-being of the animals.

Under the Zoo's current capital works program, developments due for the next year include:

- a new entry and car park;
- a multi-functional education and community complex;
- a new food area and playground/picnic facilities;
- the WA Wetlands Exhibit;
- an Education Entry Facility; and
- ongoing renovation of existing infrastructure and utilities.

The Gallery has a purpose built and relatively modern building in a prime location. Some deficiencies, however, have been identified by staff which in their view limit the Gallery's capacity to meet its objectives. The Gallery intends to address these deficiencies in future plans and budget submissions.

The Museum has found its capacity to meet both visitor needs and its conservation and heritage role greatly reduced as a result of its out-dated and poorly laid out facilities. The Francis Street site of the Museum is at the threshold of major physical redevelopment, with the commencement of

Public Access To Exhibits

a long term capital works project which includes the renovation of HackettHall, reorientation of the Museum to face the Perth Cultural Plaza, and the development of new gallery spaces. It is intended that the redevelopment will more than double the current exhibition areas and will allow the Museum to more appropriately house current exhibits as well as develop new exhibits. In particular, the redevelopment of Hackett Hall will include the establishment of a state-of-the-art exhibition centre using multi-media technologies. This total redevelopment is expected to cost in the vicinity of \$120 million and should be completed by the year 2000.

New and planned capital developments at the Zoo, Museum and Gallery will enable each to better achieve its core objectives by making the venues a more attractive place to visit. These redevelopments reflect a significant level of community financial support that places an obligation on the agencies to enhance and expand public access.

Other Access Issues

Both the Gallery and the Museum have very substantial permanent collections that cannot be displayed simultaneously. In order to ensure access to these collections they need to change exhibits periodically. The Gallery varies its permanent collection displays every six to eight weeks.

The nature of the Museum's displays is such that the length of an exhibition would be expected to be measured in years rather than weeks. It currently has a strategy of redevelopment of all displays over a five year period, excluding those that have a declared heritage value. Prior to 1993 some exhibits had been on display for two decades or longer. The new strategy should ensure that only heritage declared exhibits will remain on display for such long periods.

The Zoo faces a different challenge in ensuring the interest in and currency of its exhibits because it exhibits live animals. The Zoo has responded to this challenge by replacing concrete cages with more natural environments for the animals. One example of this has been the development of the African Savanna.

Public Access To Exhibits

In the development of exhibits, there is potential for cooperative marketing. The use of a cooperative approach to exhibition marketing can increase cost effectiveness through the pooling of resources. It also provides opportunities for the agencies to present exhibits in different ways and thereby increasing community interest in the exhibits.

All three agencies are involved with formal and informal groups which provide them with substantial joint marketing information.

However, despite their close proximity and allied function, both the Gallery and the Museum have operated largely in isolation from each other which may have denied both the chance to 'feed off' each other in developing exhibits and increasing visitor numbers. While there are some limited shared exhibitions planned, such as displays relating to the Dutch Tricentennial in 1997, and the two agencies have been cognisant of each other's exhibits to avoid direct clashes, generally their shared location has not been exploited. In particular, cooperative product development related to the tourist market could be undertaken to their mutual benefit.

Since the examination commenced, some significant changes have taken place in relation to cooperation between the two agencies. Both agencies are planning joint marketing activities, in addition to the shared management of their shops, and it is the intention of both agencies to develop a much closer working relationship.

A significant difficulty faced by the Gallery and the Museum in bringing major exhibitions to Perth from interstate or overseas is the cost of insurance. There have been examples of exhibitions being offered to Western Australia but not being taken up because the insurance premiums were too high to make the exhibitions viable for the venues.

Most other States have addressed this issue by the establishment of a State Government Indemnity Scheme whereby the government will provide the insurance cover for the visiting exhibitions. This removes a substantial cost to the Gallery and Museum and enables them to accept more visiting exhibitions.

Public Access To Exhibits

Western Australia is very isolated and there are inherent difficulties in bringing exhibitions here. The government could assist the Gallery and Museum in increasing the access to the Art of the world for Western Australians by establishing an indemnity scheme to cover visiting exhibitions.

Recommendations

- **All three agencies should review current opening hours, using current and future customer and visitor data to identify optimum opening times. Any changes should be trialed for sufficient time to enable customer visiting habits to change in accordance with new opening times.**
- **The Gallery and Museum should investigate opportunities for more cooperative marketing between themselves and with other organisations in their marketplace.**
- **The Government should consider the establishment of an indemnity scheme to cover visiting exhibitions to Western Australia to ensure that insurance costs do not prevent the Western Australian community from having access to significant international exhibitions.**

Performance Examination Reports

1994	Tabled
Utilisation of School Facilities in the Metropolitan Area	March 24, 1994
Grants to Non-Government Organisations	
Pastoral Leases	
Records Management	
Purchasing	May 11, 1994
Public Hospital Waiting Lists Information: Waiting Times – The Real Issue	October 19, 1994
Financial Assistance to Industry	
Public Rental Housing	
University Consultancy Services	November 3, 1994
1995	
Legal Aid Commission	April 5, 1995
Police Department Operations Centre	May 4, 1995
Management and Control of Minicomputer-based Systems in Western Australian Government Agencies	May 23, 1995
Management of the Public Bank Account Investments	August 23, 1995
Value for Money in TAFE	August 30, 1995
Public Sector Travel	
Corporate Card	
Cabcharge Facilities	September 19, 1995
Hospital Emergency Departments	November 1, 1995
Contracting for Services	November 22, 1995
Public Dental Services	December 6, 1995
1996	
Improving Road Safety	May 1, 1996
The Internet and Public Sector Agencies	June 19, 1996
Under Wraps! – Performance Indicators of Western Australian Hospitals	August 28, 1996
Guarding the Gate – Physical Access Security Management within the Western Australian Public Sector	September 24, 1996
For the Public Record – Managing the Public Sector's Records	October 16, 1996
Learning the Lessons – Financial Management in Government Schools	October 30, 1996
Order in the Court – Management of the Magistrates' Court	November 12, 1996

On request these reports may be made available in an alternate format for those with visual impairment.