

**Penrith Performing & Visual Arts Ltd**

**Controlled Entities Performance Update Report**

**Joan Sutherland Performing Arts Centre,  
Penrith Regional Gallery, Home of the Lewers Bequest  
Penrith Conservatorium of Music  
Q Theatre**

**Reporting Period**                      **1 July 2018 to 30 June 2019**

**Manager/Chairman**                      **Mr John Mullane, A/Chairman  
Hania Radvan, CEO**

**Document reference no.**              **[ENTER DOCUMENT REFERENCE NO.]**

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## 1. Executive Summary

Ours is a complicated business. It is irregular, diverse across its scope and must work consistently to a triple bottom line – community, culture and commerce. Sometimes the inevitable tensions between the three pose almost insurmountable challenges. When they conflict, which do we prioritise?

We ask this question on an almost daily basis as we juggle between entrepreneured shows, education needs and potential earned income from hirers – both community-based and commercial producers, whilst also considering our artistic reputation and the community impact. It is an ever-present consideration at the Gallery where we must balance the integrity of the site and a heritage, artist-designed garden against its popularity and increased visitation which, whilst most welcome, places an inevitable toll on the grounds.

Of course, the answer is that you need to maintain a good mix and a reasonable balance. We are mindful of the irregular nature of our business – the seasonal ebbs and flows as well as the annual regularity. There are things we can count on, and regular programs that anchor us – and then there are the delicious surprises and occasional adventures, the risks that are an integral part of art-making and sharing.

This year we additionally focussed on improving our dedicated business systems with the Board approving purchase of *Vend* a point of sale system for our bars and *Deputy* a rostering system for front of house staffing. These will be considered for roll out to the Gallery shop and staffing next year, now that Enta our ticketing system has been implemented and Artifax is under way. Additionally, we sought to upgrade and replace critical equipment – with an approval for a lease for an Elevated Work Platform at the Joan and implementation of a large-scale Collection Store upgrade at the Gallery.

Essentially ours is a service sector – resource intensive and heavily reliant on the staff. Be they our loyal ongoing full and part-timers, our essential casuals without whom we could not deliver events, or our valuable expert contractors. Each plays a part in ensuring that the public activity – be it an exhibition, a workshop or lesson, a piece of new Australian theatre or music – or a school or dance event produced by a community hirer – is delivered smoothly, expertly – seemingly without effort. We thank Council for the additional funding which has enabled us to ensure adequate staffing levels across our extensive public facing weekly hours across both sites.

This year brought changes in leadership – with Dr Lee-Anne Hall's departure mid-way and the appointment of Sheona White at the Gallery under a temporary contract and with an added brief to review operations. Luckily, we had continuity across the remainder of our leadership team. It also marked a very determined look outwards – the commissioning of audience research to inform our next strategic plan and operations as well as a greater focus on community co-production and design in our program implementation – including strategic funding for Q Theatre from Create NSW to deliver the Long Table project in the Atrium Foyer and a Panthers Club Grant funding to support The Hat Project.

We continually look to improve the specialist infrastructure and seek out grants, large and small, to enable us to do so. From Collection Store racking to replacement chairs, tables and rostra, and

even web infrastructure, much improvement has been achieved. However, the grants all require matched funding, and the improvements have seen a significant increase in our annual depreciation figures. Nonetheless, a service business with patron and visitor safety top of its agenda and public interest at its core, cannot move forward without continuing to invest in essential assets.

This year's financial result was disappointing – next year's budget has been devised and approved in accordance with Board direction with conservative income projections. We have also reviewed charges. Where they have been static for extended periods (whilst costs have not) they have been raised. Nonetheless our artistic ambitions remain high and delivery plans extensive and comprehensive.

## 2. Highlights to Date

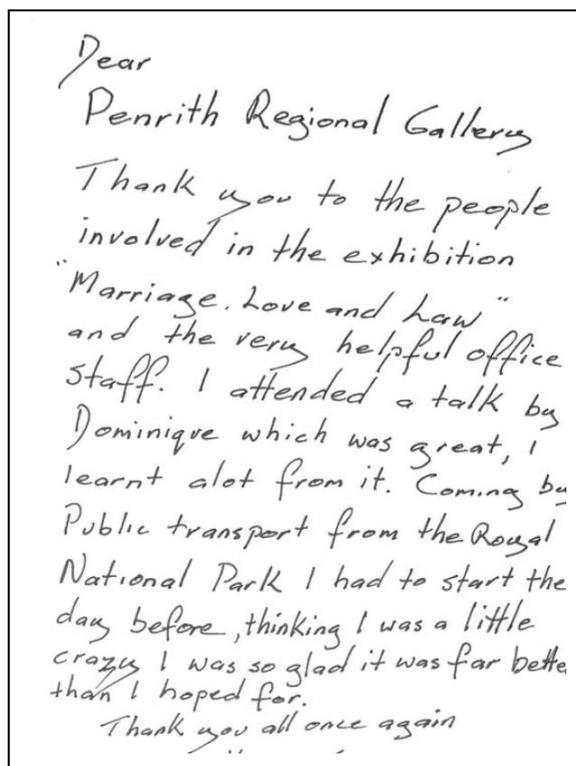
### 2.1 Key Artistic Highlights of the period

#### Sector partnerships

Two major exhibitions suites were delivered in this period through curatorial and presenting partnerships with state institutions: *The Ideal Home* with the Museum of Applied Arts and Sciences (MAAS) and *Love: Law and Marriage* with the State Archives. These partnerships extend the capacity of our organisation to deliver outstanding, impactful exhibition suites as well as enabling deeper inter agency engagement for staff professional development (both theirs and ours). They do however put considerable pressure on our budgets as we strive to meet the production and artistic investment expectations of larger organisations with greater capacity. Both were popular with visitors and both have been nominated for the prestigious Museums and galleries sector annual iMAGine Awards.

Our partnership with the Australian Chamber and the Penrith Symphony Orchestras continued for the Penrith Youth Orchestra program and a new partnership with the Australian Theatre for Young People was brokered to support a joint initiative in the second half of 2019.

These important performing arts partnerships continue into 2020 and funding for the PYO has been secured from the Crown Resorts and Packer Family foundations through their Western Sydney Arts Education initiative for the period 2020-2022, during which time the orchestra will establish itself, with the partners support, as an independent arts organisation.



### **Supporting local early career artists - introduction of Q Indie**

Bridging the gap between our early career artists labs and full production development and support, in late 2018 in association with Sydney Fringe, Q Theatre trialled risk-shared Q Indie in the Mullins Studio whereby independent artists were offered the chance to present a work for a share of the box office. Two previous Q Lab artists – Will Tredinnick and Vonne Patiag took up the offer with *Table for Two* and *Obviously!*

Will went on to win NIDA's emerging artist award at the Sydney Fringe Festival with his work and has subsequently toured it to Adelaide and Melbourne fringe festivals. Vonne has taken the experience and applied the dramatic techniques to his screen work - his most recent screen work (*Halal Gurls*) can currently be seen on iview featuring another Q Theatre associate – Aanisa Vylet as well as western Sydney artistic royalty – Bryan Brown. Both Vonne and Will are part of the ongoing Venue Services team, ably demonstrating the mix of employment that supports artists and the value of our broader program in providing income for volatile creative careers.

Early in 2019 a further Q Indie initiative – *Project Bestfriendship* played to appreciative audiences as part of Mini Gras, involving previous members of our Originate young artists ensemble.

Whilst artistically valuable, on balance the internal resources to support this strand have been considerably greater than planned, and for artists attracting a large enough box office to cover costs, a considerable challenge. Therefore, we will look to alternatives into 2020 and are currently exploring a partnership with Western Sydney University for regular casual music jams for early career musicians (including students) in the Borland Foyer.

### **WSU training delivery**

In late 2018 we were approached by the WSU Music department to consider delivery of instrumental tuition to undergraduates. This fee for service builds employment for our tutors and extends the reach and visibility of our Conservatorium whilst also providing a valuable service in our local community. Whilst complicated in its instigation, this delivery has now been successfully delivered across two semesters in 2019 and we hope it will continue into 2020. Feedback from WSU is positive about both the students' experience and its value within the course as perceived by the academic staff.

### **First Nations Work - Hat Project/ Warali Wali - Long Table – Muru Yuu Yura**

These projects utilising community partnered methodology within our practices – with a focus on our First Nations communities – initiated projects all with a longer-term intent on increasing First Nations programming and engagement through enduring relationships.

Supported by Carolyn Gartside and Karen Harris from Penrith City Council and a grant from Panthers, the *Hat Project* has enabled a group of senior Aboriginal women to meet regularly at the Gallery, exchange personal stories and design and make hats through a series of millinery workshops. The resulting exhibition is being installed as this report is written and will be exhibited in the Lounge Gallery throughout summer.

Additionally, a commission from Cope Street Collective for *The Ideal Home - Time Gay Ole* extended our First Nations activity with practicing local artists and a video work which was devised and filmed across the site.

At The Joan, a group of women led by Aunty Sharon from Muru Mittigar met weekly to learn the practice of crafting possum skin cloaks and to work together on the creation and crafting of such a cloak. Yet to be installed and launched, this incredibly beautiful work resides in storage at The Joan as we work to develop its exhibition and a launch event with community.

Through Long Table and First Nations curator Venessa Possum ably supported by assistant curator Nathan Sentence and production assistant Georgia Mokak, a series of weaving, crafting and yarning events were held in the Atrium Foyer throughout June 2019, resulting in the collaborative artwork which remains installed. This lovely work was crafted from local invasive weeds by artists and community members through a series of open workshops at the Long Table.

### **Create NSW Fellowships**

Four artists associated with Q Theatre were awarded 2018-19 fellowships from Create NSW, sharing in over \$95,000 to support self-directed professional development programs and career advancement projects. The artists included our own New Work Director Nick Atkins; our New Work Producer Emele Ugavule; Aanisa Vylet our 2017 Southlands Breakthrough Award recipient and a previous Associate artist with Q Theatre; and Bernadette Fam – a member of Q Theatre's 2018 Originate ensemble who was supported in her fellowship through development space at The Joan. It was an extraordinary result representing a fifth of all recipients across NSW and a quarter of all available funding, and clearly representing the valuable role our theatre programs play for early and mid-career artists.

### **High School Youth Programs - Night Garden/ Annual Youth Theatre Festival**

The third iteration of the Night Garden pop up youth arts festival at Penrith Regional Gallery saw approximately 600 in attendance with seven participating high schools and 318 students showcasing their work. The students 'take over' all the spaces across the site, including the garden, installing their work in amongst the existing exhibitions.

Meanwhile at The Joan, this period was bookended by delivery of two Annual Youth Theatre Festivals (AYTF), *Decoded* (2018) and *Mother* (2019) with eight schools and over 100 students each year working through development to production and performance. The methodology partners a practising theatre artist with a high school year 11 drama class through a series of in school workshops to develop a short piece to a set theme and in a chosen theatrical genre. All the pieces are then directed into one cohesive, episodic whole for presentation at The Joan with a professional design and production crew. In 2019 a year 11 VET student was also provided the opportunity to assistant stage manage – a valuable experience for the student providing support also appreciated by the team.

These programs not only provide access to an immersive professional industry-based Q Theatre experience and expert mentors – but also enable families and peers to share in students’ achievements in a professional setting.

### **Major production – Yellow Yellow Sometimes Blue**

This Q Theatre commission, inspired by the Lewers’ story and era, completed a two-week season in November 2018. The work achieved its artistic and commercial targets and established a new benchmark for a successful new writing project produced by Q Theatre. In 2019 it went on to win an (another!) AWGIE for playwright Noelle Janaczewska. On the back of Council’s DiG project, local composer and musician Me-Lee Hay wrote and performed a cello score as part of this world premiere production. Me-Lee has gone on to work on other theatre pieces because of this commission.

### **Artists in residence**

Summer Studio residents - Miguel Olmo : Marian Tubbs

Q Theatre Lab residents - Jules Orcullo (*TwentyOne Sixty Five*): Pippa Ellams (*The Sorry Mum Project*): Grad Co Studio: Jermain Chau, Paul Smith and Donna Hewitt

Following open call outs, selected artists were provided with studio space and stipends to support the development of new work and/or creative explorations. Always highly competitive and much prized, these established programs will be reviewed to ensure they remain as relevant as possible into the future. Meanwhile we have a call out currently active for two residencies with a connection to St Mary’s as part of our 2020 program.

## **2.2 Selected Marketing and Business Highlights**

### **Website suite – ppandva.com.au family**

This period saw the brand re-refresh indicated last year come to full fruition – with the remaining sites going live and additional, niche Facebook and Instagram pages launched. With stronger staff involvement and leadership of the various pages we can now build our targeted communications by program as well as cross promote, reducing the volume of unwanted/irrelevant content. The ppandva url has also simplified business cards and identity for the growing number of staff who work across sites and programs as well as given us a clear home for governance and whole of organisation materials – as well as clear links to the full suite of sites.

Our URL suite: ppandva.com.au

thejoan.com.au : penrithregionalgallery.com.au : qtheatre.com.au :penrithconservatorium.com.au

### **Trusted arts partner – monthly calendars and subscription guide**

The 2019 subscription brochure simplified The Joan’s offers and brought them all together, introducing also the *classic: fun: adventurous* meters to assist patrons in choosing their desired experience. This innovation was well received and has been continued into 2020. During the period the monthly calendars available for download or pick up at The Joan were also extended to include a monthly calendar for the Gallery.

### **Subscription results**

A downturn in overall subscription sales experienced in 2018 (GBO \$40,110 and total tickets 875) was successfully reversed for 2019 (GBO \$61,261 and total tickets 1227) and is on trend for 2020 having achieved 23% of the annual target in under 3 weeks of live sales.

We hope that by refining and simplifying the annual offer each year whilst also providing excellent value for money and variety we can continue to build this valuable audience base. Key changes of a simplified overall percentage discount (which increases the more you book), introduction of special senior's matinee prices and engagement activities (meet and greets, post show Q&As and creative team pre-show talks) as well as the handy genre and experience guides introduced for 2019 have proved popular and have been retained.

### **Creative Kids**

Studio Q was selected to pilot the program by Service NSW. This pilot program provides parents a \$100 voucher each year that can be put towards extra-curricular arts and creative programs. It therefore does not affect the bottom line as such – but does increase accessibility of programs and has potential to grow their reach.

Our initial excitement at this was tempered by the teething problems at Service NSW which have seen implementation issues delay take-up as the complexity of our business (with three separate offers and sub brands) unable to be accommodated by the system until September 2019. A great deal of time and persistence by our Operations Director has been aimed at getting the registrations sorted and talking Service NSW through the challenges and system failures. We expect that full growth and implementation to occur from 2020 when all eligible programs can finally advertise their Creative Kids status with confidence.

### **Venue Hire**

We continue to refine our processes around venue hire and applied subsidies to ensure parity and consistency, whilst still maintaining a level of flexibility to ensure bulk/repeat users with shared objectives and first-time hirers are secured – and then kept.

The teams focus has been on responsiveness – and significant changes in programming approach have been implemented that provide earlier and equal access for hirers with our own program often manoeuvring dates to accommodate key community and commercial groups. This has proved fruitful – with community groups retained and eagerly reserving dates for the following year and a significant increase in commercial hirers – both large and small (see KPIs for the trend and results). Integral to this has been the additional staff resourcing approved by the Board in both the finance team (Finance Coordinator from part time to full time and a part time assistant added) and the Venue Services team (part time venue assistants) – which mean we can settle shows and disburse funds held in trust through the Box Office far more promptly than ever before.

Building a good reputation is critical in this industry and our exceptional staff frequently attract unsolicited positive feedback from hirers.

*“just a quick email to thank you and your team for a great evening at the joan. as you saw on the night tim and ben did a really terrific job and made the show look and sound excellent. and haydn at front of house could not have been more accommodating and helpful. please pass on kitty's appreciation to the entire team. we'll look forward to returning to penrith with her new show in the near future. “*

## **2.2 Infrastructure and facilities**

Two major projects occurred at the Gallery during this period – construction of the new commercial kitchen for the café (now completed and operating well) and the Collection Store overhaul with new racking and shelving as well as additional machinery for safe access. Despite the disruption on site the café remained open and with a secret temporary store built into the Regional Gallery itself – the site remained open and active throughout. We thank Council for project management and loan to achieve the kitchen – and Create NSW and the stronger Communities Program as well as White Rabbit Gallery for their contributions to the Collection Store Project – which rose in priority due to several significant and extensive gifts (artwork donations) approved in recent years as well as an independent report funded through the Heritage program that highlighted critical inadequacies.

The restoration of the Bath House roof was also completed – shortly followed by the restoration of the Ancher House kitchen. Both look wonderful – we thank Council for the care and investment which sees these treasures preserved for the enjoyment of future generations.

At The Joan the installation of the electric winch in the Q Theatre and new carpeting in the Borland Foyer through asset renewal have each in their own way made a tremendous difference to our functionality. Refreshed signage throughout and additional notice boards are assisting patrons to find their way to our various venues, something especially important on the evenings when all three and the Conservatorium are in operation.

## **3. Future planned activities and programs**

### **3.1 2020 Program**

The Joan has launched its 2020 season programs – with brochures available for the full season, kids and families and Morning Melodies. In 2020 we celebrate The Joan's 30<sup>th</sup> year – which will be marked by a signature concert featuring six grand pianos and percussion, plus the unveiling of a specially commissioned portrait of our guest of honour and Concert Hall namesake. Full program details are available on The Joan web site.

A cross promotion initiative has been implemented targeting fine music lovers to encourage Penrith Symphony bookers to book Joan fine music events (and vice versa). We have also launched **Penrith Arts Lovers** – an annual \$40 membership (free to subscribers of 8 or more shows) that unlocks discounts, special offers and invitations. Inaugural business partners include Quest Penrith, Beefy's Burgers, Café at Lewers, Mr Watkins and the Very Bazaar. We intend to grow the program over time.

A new initiative, *Street Notes* will use proven Q Theatre methodology and apply it to music artists in 2020, thanks to the Great Walk Foundation. The ensemble/mentoring project will curate mini concerts to 'pop up' across High Street and arcades in 2020.

### **Dream Realised – a fight for our gallery**

The 2020 signature exhibition at Penrith Regional Gallery will be *Dream Realised* in Autumn 2020 – marking the 40<sup>th</sup> anniversary of the campaign for cultural access which resulted in the establishment of this important gallery – the first of its kind in Western Sydney. We are also negotiating with the Art Gallery NSW for two touring exhibitions – with confirmation subject to meeting strict security controls.

### **Q Theatre – taking to the suburbs**

In 2020 Q Theatre embarks on two longer term projects – People in The Park in Kingswood and St Marys Kid. Both are partnered with Council teams (Neighbourhood Renewal and Community & cultural development) and both are envisaged as community co-productions with professional arts leadership. Both exciting projects are part of our development practice nonetheless both will have public outcomes in community although larger scale events may not occur until 2021.

## **4. Challenges and Issues**

### **4.1 Changing technology standards – theatrical lighting**

Despite the large-scale upgrade to technical equipment implemented in 2015/16 as a result of Clubs Grant funding and refreshed regular asset renewal funding through Council, further technical catch up remains outstanding.

Several critical matters have recently increased in urgency – with system failures appearing as technology ages and is superseded.

Most urgent of all is the need to change out all remaining halogen theatre lights with LED lighting within the next five years. That is around 250 lights across the three theatres. Philips have stopped manufacturing all incandescent globes for theatre applications, and because they were the major global manufacture, this has created an issue with supply.

Whilst our Technical Manager has become expert in tracking down remaining globes, this is becoming increasingly difficult. An additional complication has recently occurred with racks failing with no warning. Some very fast thinking and actions on the part of the technical team members has twice saved community hire performances in the Concert Hall in recent weeks.

The complexity of having racks of different generations (each with their own signature dimming curves) has meant the team has had to juggle across venues to attempt lighting consistency, particularly for dramatic performances with complex lighting plots in the Q Theatre. Naturally the juggling and problem solving in advance of show time when sudden failure occurs eats into staff time – but most importantly it now means that we have

insufficient functioning racks to operate both major venues simultaneously with any certainty. In the short term hired racks will carry us through the busy community season to the end of the year. Three have now failed and we will be looking to maintenance to replace them.

The technical team has been asked to devise a replacement plan – prioritised to replace the front of house wash lights and specials with the discontinued globes. This needs to occur over time as we wait for technology to improve as LED is still not as subtle and effective in dramatic contexts (unless one purchases at the greatest expense). The plan will factor in energy efficiency and power savings possible through greater reliance on LED.

Following several years of significant investments and asset renewal across both sites, we are aware that the next financial year has no Council asset renewal allocation against The Joan. However, we are working with Council officers to develop an asset renewal plan and identify any funding opportunities as a staged plan to swap out our remaining incandescent theatre lights must be costed and progressed over the next five years before a lack of globes and racks makes our venue barely usable.

#### **4.2 Changing technology standards – Q Theatre Hearing loop**

In similar vein the hearing loop in the Q Theatre continues to cause us problems as increased electronics within the venue appear to be increasing interference with the now obsolete technology. Quotes and alternatives are currently being sourced for replacement/repair as technology has advanced greatly in this area since installation 14 years ago and it appears the situation has worsened considerably in the last 12 months with patron complaints received.

#### **4.3 Change in State government priorities**

PP&VA last applied for multi-year funding through the state government in 2015. At that time there were funds dedicated for Western Sydney arts. A three-year agreement was approved (with only a slight increase). This has been twice rolled over since 2018 retaining funding at \$375,000 per annum to the end of 2020.

This year, Create NSW has updated its Funding Framework and changed guidelines and the assessment process and criteria. Whilst Western Sydney remains a priority area (along with young people, Indigenous, CALD and disabled), no dedicated funding or strategy has been retained.

This year separate guidelines and process have been introduced for independent arts organisations and LGA arts and cultural programs. Despite our legal status we have been advised that we must apply as an LGA arts and cultural program (which does not preclude a second application from Council), given the majority of our subsidy is from local government and we operate Council owned premises. Guidelines were released on Tuesday 26 November with applications closing on 5 March 2020.

We understand from Create staff that there is a desire not to underwrite 'Council' responsibilities but to fund additional activities. However, the newly released guidelines

make a broader set of activities technically eligible, including capital expenses. We must urgently navigate this new environment and have brought forward Strategic Planning processes in order to meet the newly announced deadline.

There is no doubt that new art form boards and new guidelines pose a risk. Historically the majority of funding has been directed towards Q Theatre – our point of difference and creative strength. Nonetheless an integrated cross art form proposal must go forward that unites our creative programs, audience and community engagement and artist pathways across music, theatre and the visual arts.

## **5. Financial Position (Actual to Budget)**

The financial year end saw us return a deficit of \$71,771. This contrasts with the surpluses posted over the previous five consecutive years (see business trends for full details).

Our depreciation write-down for the year was \$82,963 (\$25,507 more than the previous year) with expenditure on capital (predominantly plant, office and furniture and fittings) totalling \$179,594 (\$195,134 in 2017-18).

The accepted arts sector benchmark for Reserves and Surpluses (liquid assets) is 20% of turnover (generally considered within the sector as expenses, which this financial year equalled \$4,388,192). Excluding our Artwork Reserve, the Retained Surplus (\$197,695) and Capital Equipment Reserve (\$188,000) bring the Company to 8.8%, well under half the industry benchmark.

The financial result reflects a stage in company growth where our artistic ambitions and staff growth have outstripped our ambitious income targets. However, the overall business trend remains positive with growth across all our areas.

The current focus must not only be on ongoing careful financial management and strict internal controls but also on paring back discretionary expenses, limiting risk and attracting additional earned and contributed income.

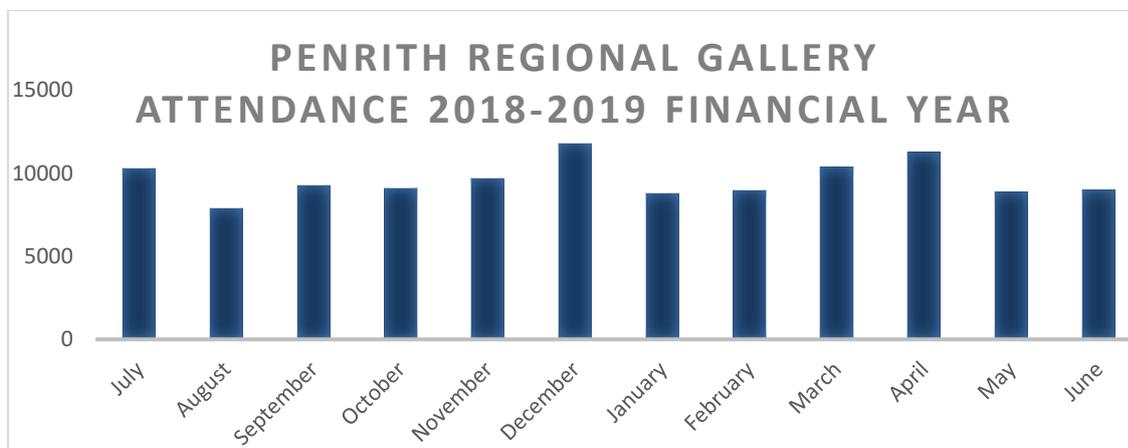
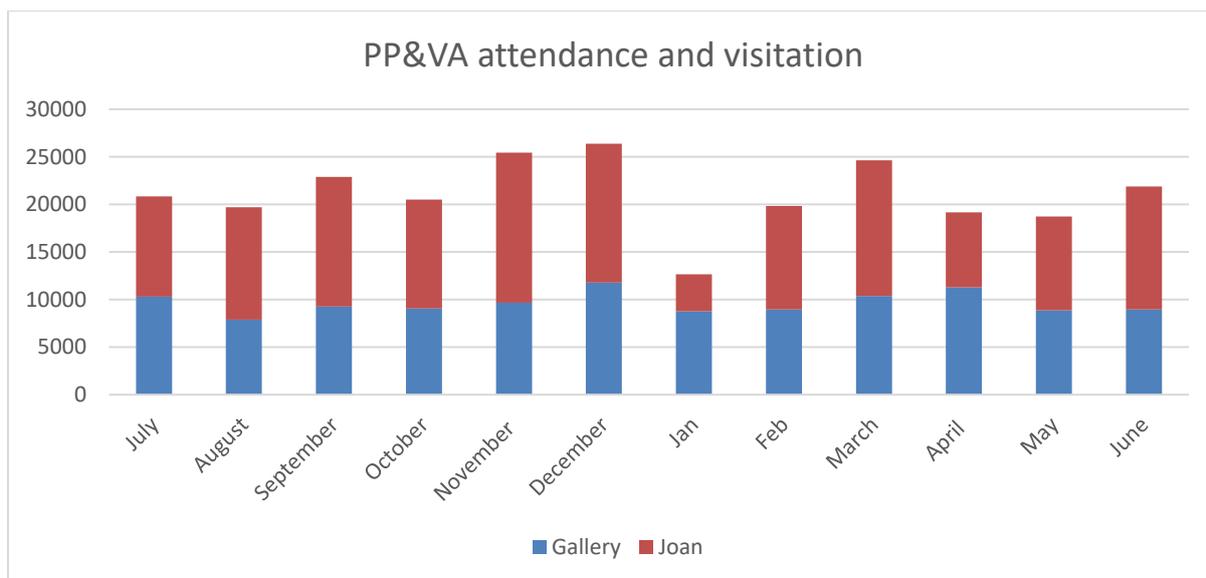
As at the end of October 2019 the Company is trading with an overall -1% variation in total income and a 0.2 % variation in total expenditure. A result, given the capricious nature of theatrical entrepreneurial delivery and our reliance on third parties for our variable earned income, which is considerably better than at the same period in the previous year.

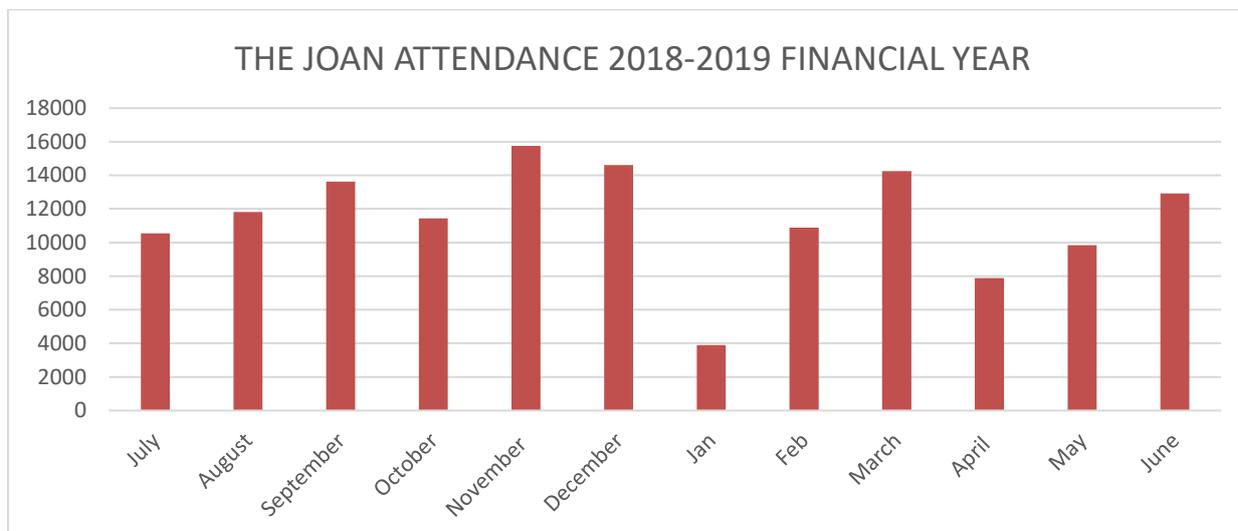
**6. General Information and KPI's (i.e. – visitation, staffing, events etc.)**

Within the period the PP&VA applied discount to Community Hirers on venue hire at The Joan totalled **\$308,901.20**. An additional **\$28,000** in subsidised ticketing services was also applied to Community Hirers enabling them to make use of our professional Box Office systems without compromising their income stream which offsets their production costs. This is critical as many offer low priced tickets to events to enable access.

Total visitation and participation across both sites was **227,884** which is slightly down on the previous year. Total Gallery visitation for the financial year is estimated at **115,174**. Total Joan attendance is estimated at **122,710** – however we are aware that we are failing to count all community performers accurately as Hirer estimates vary widely and are inconsistent.

The chart below clearly shows that The Joan in particular is quiet in January which is when many staff are encouraged to take leave.





**Statistical summary – Joan ticketed events 2018-2019**

	<b>Gross Box Office</b>	<b>Number of Attendees</b>	<b>Number of Performance</b>	<b>Number of Seasons</b>
Joan presented shows	\$613,872	22,221	98	45
Community Hires*	\$596,518	22,991	75	42
Commercial Hires	\$424,444	6764	19	15
<b>Totals</b>	<b>\$1,634,834</b>	<b>52,016</b>	<b>192</b>	<b>102</b>

This represents overall growth on the previous year where GBO was **\$1,554,197 (+\$80,637)** across **201 (-9)** performances in **101 (+1)** seasons and attendances totalling **50,315 (+1701)**

**Audience Research**

PP&VA undertook a consultant led comprehensive audience research project in 2019. This was undertaken in two parts – two focus groups held on each site (one with regular attendees, one with infrequent on non-attendees). The focus group results then informed a questionnaire which was distributed widely by e-mail to our databases and through social media. An excellent response rate of 861, with 755 completed, provided us with a 95% confidence level and 3.5% margin of error (based on a database/population size of 10,000).

Whilst this is still undergoing analysis the summary findings are:

Support for The Joan and for Penrith Regional Gallery is strong amongst participants in this research. Virtually everyone wants to see them and their programs flourish, to achieve a higher profile, deeper engagement, and to attract a more diverse audience including more younger

people. Almost everyone who participated in the online survey had attended an event or exhibition at The Joan or Penrith Regional Gallery, Home of the Lewers Bequest\*, within the past 5 years. They are, therefore, broadly representative of our audiences. The experiences they have with us have **profound impacts** (around one third say their **attendance makes them feel more connected, and more positive about the future**), with just under half agreeing they **love highly charged emotional experiences, and don't mind if it's confronting**. Just under half also agree that events they've attended **made them feel really proud of the Penrith region** – illustrating that Penrith Performing & Visual Arts' program really does **contribute to civic pride**.

We have learnt a lot – including what people want more of, what we do badly or not so well – and how we could change.

Select quotes from the research:

From Joan focus groups:

*“And particularly out here it's important. For many years I lived in the city and we had many theatres that were only 20 minutes away so I find it really good to have the same sort of theatre out here. I think that's why The Joan does such a great job of giving quite a varied program because there's going to be something that most people like most of the time”*

*“We just can't praise it enough, the variation and the opportunity to go to performances.”*

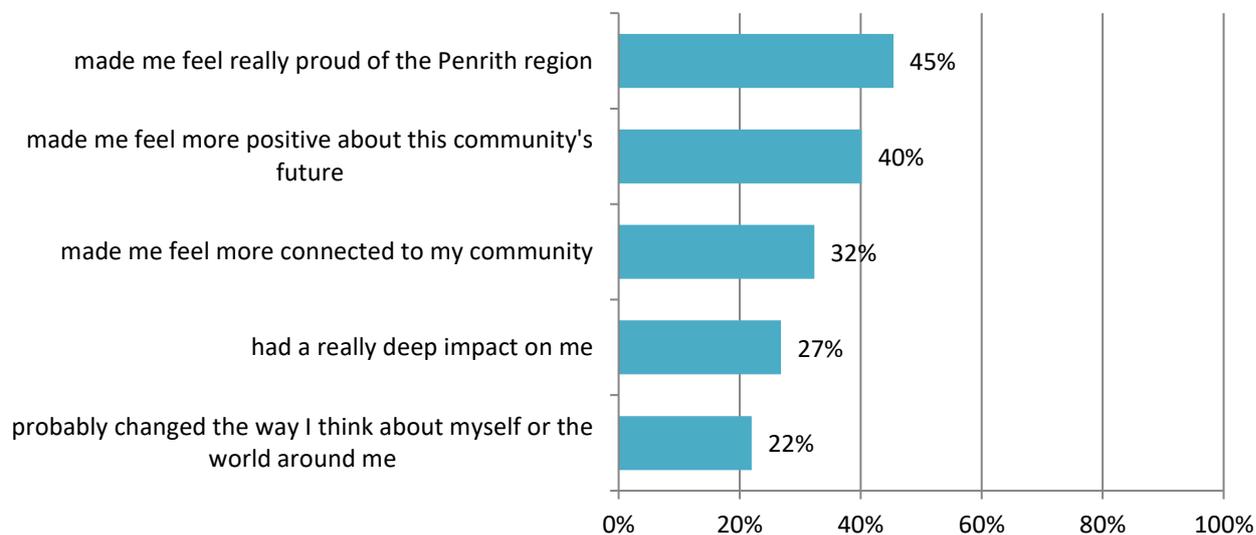
*“Nothing I like more than the next morning you get up and you are still thinking about the story. I [don't] need a particular positive or negative emotion but I guess admiration for the production, I always want to feel that, and go, 'wow that was so well done' and then if it is a sad thing to go, 'I really properly felt sad, that was great' or 'OMG that made me so angry that was well done' .. And it lingers.”*

From gallery focus groups:

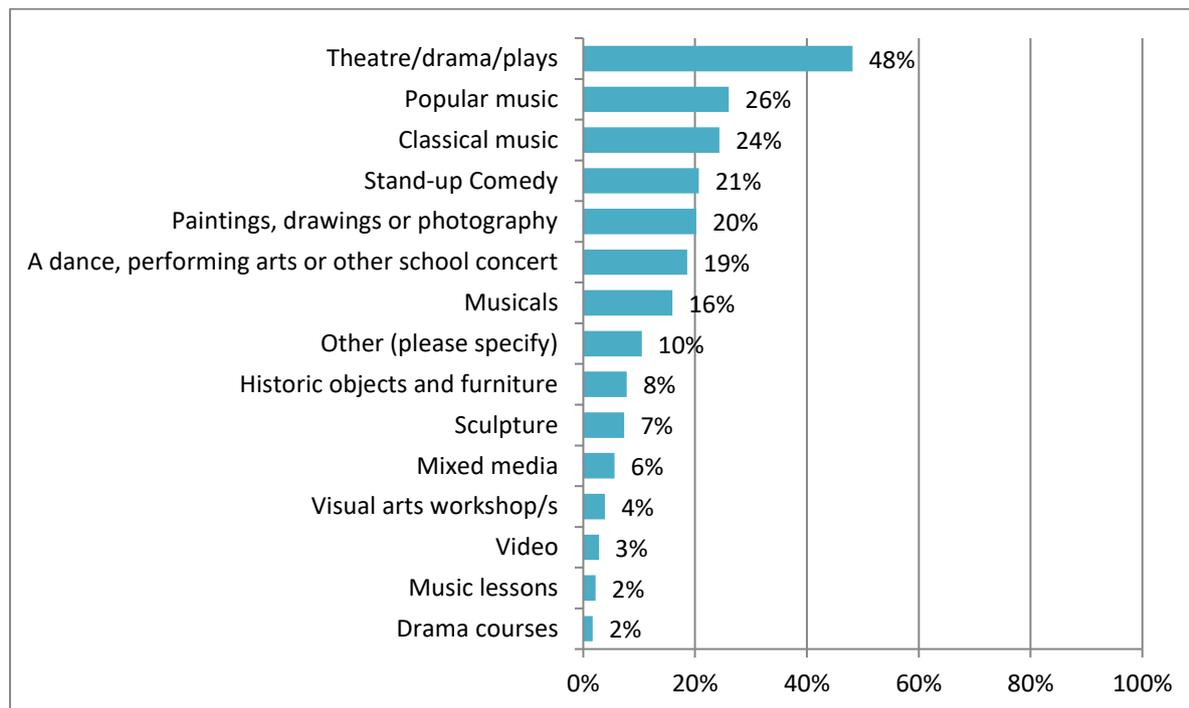
*“I have nothing to do with the arts world whatsoever - I work on the railway - but I love bringing my granddaughters along to art galleries, museums, etc.”*

*“I use it (the Gallery) in so many different ways. we use it to try and get the kids used to going to galleries, which is a nightmare, because they are 6 and 4, and so it gives us an opportunity to go in see things, talk about them, and then they can play in the garden and have something to eat as well. But I also come here a lot by myself to do work in the garden, or if I am wanting a break and have coffee, so **for me it serves a lot of different purposes** and I find that if I am ever meeting people for coffee they all want to go to Coffee Club - which I absolutely hate - so I am always going, **'hey there is this place on the other side of the river, it is way better, the food is better, it is cheaper, there is an art gallery there, the gardens are awesome, it is so much better'** so for me I am always trying to entice people just a little bit further over the river.”*

**Some events at The Joan or Penrith Regional Gallery have ..**



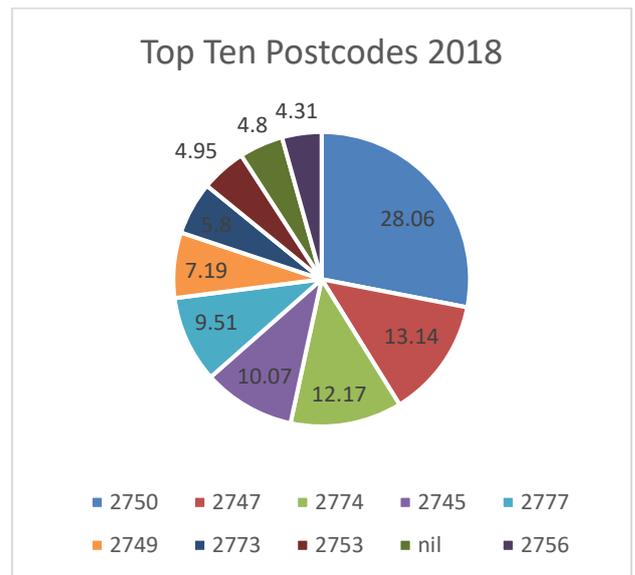
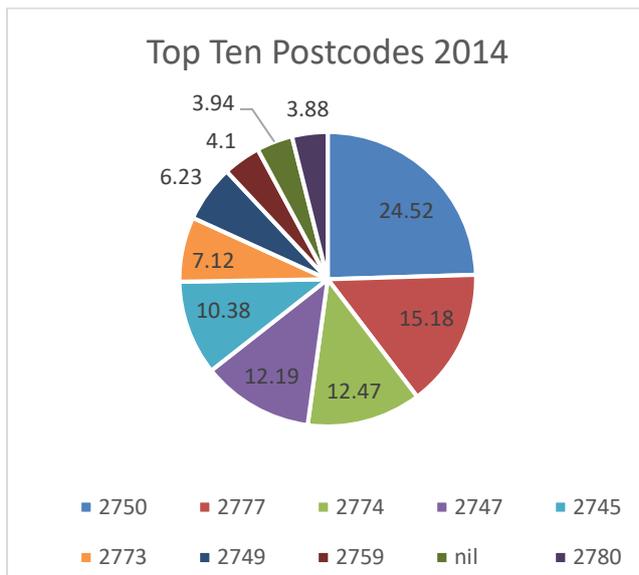
**People who have attended said they went to ..**



## Business Trends

### Top Ten postcodes

An examination of the top ten postcodes across all ticketing (excepting Conservatorium) since 2014 shows a 10% swing to Penrith LGA postcodes (57.42% in 2014 and 67.72 in 2018).



### Change in hiring make up

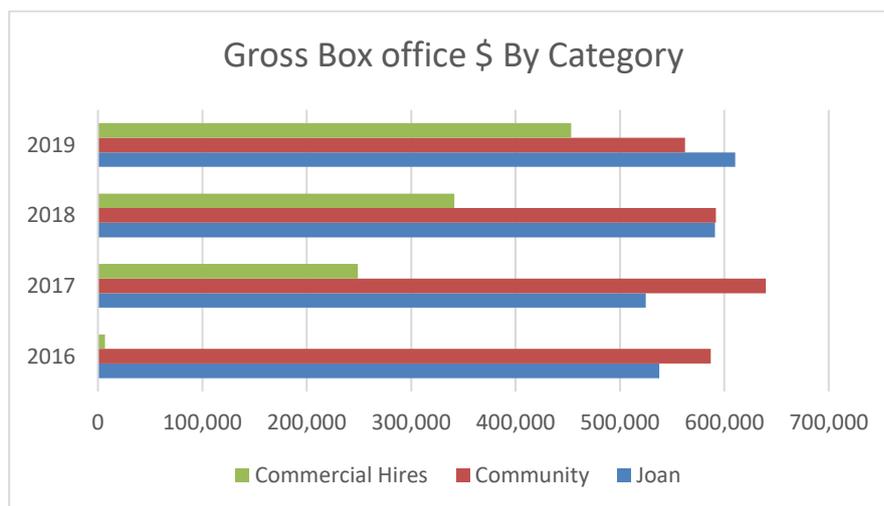
The steady growth of commercial venue hires since 2016 can be seen in the charts and table below.

No of Events	FY 2016	FY 2017	FY 2018	FY 2019
Joan	53	48	51	47
Community	46	42	43	39
Commercial Hires	2	4	9	16

GBO	2016	2017	2018	2019
Joan	\$537,586	\$524,675	\$590,945	\$610,506
Community	\$586,924	\$639,599	\$591,780	\$562,481
Commercial Hires	\$6,915	\$248,810	\$341,256	\$453,236

This was a goal set in our 2016-2018 Strategic Plan. It also shows solid growth in Joan attendance and gross box office over the same period but a small decrease in community events.

The importance of commercial hires is not only to our bottom line, but also critically to the local entertainment offer and audience development. We have strong bookings into 2020 and hope we can continue to grow this trend.



Over the past 6 years our annual turnover has grown by over \$1million (or 36%). In this same period we have managed to keep our earned income at around 30% of total per year – with small percentage variations from year to year.

	2014	2015	2016	2017	2018	2019
<b>Total Grants &amp; Contributed Income</b>	\$2,033,410.00	\$1,952,494.00	\$1,954,054.00	\$2,439,332.00	\$2,712,047.00	\$3,023,847.00
<b>\$ Variance</b>		-\$80,916.00	\$1,560.00	\$485,278.00	\$272,715.00	\$311,800.00
<b>% Variance</b>		96.02%	100.08%	124.83%	111.18%	111.50%
<b>% Tot Income</b>	62.85%	57.12%	55.64%	67.17%	69.45%	68.91%
<b>Total Earned Income</b>	\$947,475.00	\$1,122,912.00	\$1,172,294.00	\$1,178,951.00	\$1,270,816.00	\$1,278,790.00
<b>\$ Variance</b>		\$175,437.00	\$49,382.00	\$6,657.00	\$91,865.00	\$7,974.00
<b>% Variance</b>		118.52%	104.40%	100.57%	107.79%	100.63%
<b>% Tot Income</b>	28.71%	32.59%	32.95%	32.43%	31.80%	29.63%
<b>Total Income</b>	\$3,299,809.00	\$3,445,740.00	\$3,557,755.00	\$3,634,885.00	\$3,996,551.00	\$4,316,421.00
<b>\$ Variance</b>		\$145,931.00	\$112,015.00	\$77,130.00	\$361,666.00	\$319,870.00
<b>% Variance</b>		104.42%	103.25%	102.17%	109.95%	108.00%
<b>Total Expenses</b>	\$3,235,518.00	\$3,418,068.00	\$3,512,228.00	\$3,631,312.00	\$3,905,070.00	\$4,388,192.00
<b>\$ Variance</b>		\$182,550.00	\$94,160.00	\$119,084.00	\$273,758.00	\$483,122.00
<b>% Variance</b>		105.64%	102.75%	103.39%	107.54%	112.37%
<b>Surplus/Loss (Before Tax)</b>	\$64,291.00	\$27,672.00	\$45,527.00	\$3,573.00	\$91,481.00	-\$71,771.00