

Broadening the Experience

Enhancing Customer Service

Improving the customer experience continued to be a priority this year. Customer research was undertaken, as well as a brand refresh, review of customer service processes and a range of access projects. An Onsite Conversion Study provided information on how visitors use our site, while the online survey measured overall customer satisfaction at 81% (78% in 2007/08). Refer page 56 for further information.

A number of Access Strategic Plan initiatives were achieved. In March 2009, Sydney Opera House Presents performances and The Essential Tour became affiliated with the NSW Companion Card, providing complimentary tickets for carers assisting patrons with severe disabilities. Awareness of access services was increased through new brochures and online information. Refer page 57 for further information.

Bringing Sydney Opera House events to a global audience, a digital content portal was developed for the website. With a beta version launched for the *Luminous* festival in May and June 2009, some 14,000 people in Australia and around the world watched a live stream of the Sails being lit on opening night. Providing remote access to events, the channel will continue to develop as part of a broader strategy to reach the online community.

New Engagement in a Challenging Environment

With the number of international visitors to Australia continuing to decline, tour numbers at Sydney Opera House decreased by 3.25% to 318,889. A firm pricing policy and careful control of operational costs have driven an 8% increase in revenue to \$7.83 million and 30% growth in margin to \$3.26 million.

Growth in customers from China, Taiwan, Japan, Europe and Australia has largely offset a significant reduction in numbers from the USA and UK. Uptake of Mandarin language tours grew by 12% to 58,322 people, and Japanese participation grew by 28% to 23,150. The domestic market also grew in importance, generating over \$1m in revenue for the first time (growth of 25%) to become our second largest market.

The first language tour in French was successfully trialled this year and will be introduced on a permanent basis from July 2009. A collection of tourism products including the Sydney 5-in-1 card, a new Photo Souvenir product, and Show Plus packages combining a show ticket, tour, dinner and interval drinks, have also added to growing revenue streams.

Commercial Services & Partnerships

Improvements in commercial operations this year included a more proactive approach to licensing and promotional opportunities. This focus has already seen a growth in commercial licensing contribution of 122%, including licensing for the *Star Trek* movie world premiere in April 2009 and the cross-promotional retail and tourism launch of the Sydney Opera House *Idea to Icon* book in Mandarin.

Faced with a challenging economic climate, food and beverage contribution reduced by 2.2% this year and retail sales decreased by 10.5%. The retail strategy is now focused on transitioning to a new partner with specialist tourism related retail and brand management experience in order to maximise merchandising opportunities on and off the Sydney Opera House site.

Community Access

Since 2007, The Balnaves Foundation Open House Program has enabled 5,769 individuals, from over 60 disadvantaged community groups, to attend a performance at Sydney Opera House – many for the very first time. This year 1,864 subsidised tickets at \$5 each were provided to performances, including *Holy Cow!*, *Christmas at the House* and *Le Grand Cirque Aerial Dreams*.

Fostering innovation and excellence in the arts for more diverse audiences, The Keir Foundation invested in Brian Eno's *77 Million Paintings* in The Studio, as part of the *Luminous* festival. Free daily access was provided to over 19,000 visitors who viewed this audio-visual installation.

The Year Ahead

- Weekly Customer Journey Map implemented, providing customers with information about onsite activities and special offers.
- French language tour to commence.
- Continuing work with commercial partners to leverage marketing and other opportunities for growth across the Sydney Opera House precinct.
- More educational and community access initiatives onsite, offline and online to expand the Sydney Opera House experience.
- Appointment of external access ambassador.





New opportunities to engage with people onsite, offsite and online were created this year and research helped us to understand more about our customers. The challenges of current economic times were successfully managed and with support from partners we increased access for community groups.



5 Year Guided Tour Trend

YEAR	PEOPLE
08/09	318,889
07/08	329,619
06/07	328,224
05/06	270,040
04/05	246,914