



Horizon Festival Development Plan 2019 – 2023



Indigenous Acknowledgement

Sunshine Coast Council acknowledges the traditional Country of the Kabi Kabi and the Jinibara Peoples of the coastal plains and hinterlands of the Sunshine Coast and recognises that these have always been places of cultural, spiritual, social and economic significance. We wish to pay respect to their Elders – past, present and emerging and acknowledge the important role Aboriginal and Torres Strait Islander people continue to play within the Sunshine Coast community.

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Acknowledgements

Council wishes to thank all contributors and stakeholders involved in the development of this document.

Disclaimer

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Executive Summary

This Horizon Festival Development Plan 2019 - 2023 is a key document to deliver the festival until 2022 (financial years 2019/20 – 2022/23), as well as providing guidance and direction in decision-making for staff, stakeholders, sponsors and festival partners. It has been informed by:

- Analysis of past-festival performance.
- Benchmarking against similar local government arts festivals.
- Community engagement of attendees, participants and volunteers.
- Sector engagement with Arts Queensland, Tourism and Events Queensland, Sunshine Coast Arts Advisory Board and the Major Events Board.
- Internal engagement with relevant stakeholders.

The annual festival, which began in 2016, has recorded over the three festivals:

- 128,211 attendees
- 22.3% average visitors to the region
- 2,235 artists engaged
- 370 First Nations artists
- 330 disabled artists
- 90% rating for the festival's ability to 'increase the appreciation of the value of arts, culture and heritage as part of community life in the region'
- 88% rating for the festival's ability to 'promote a sense of community pride'
- 87% rating for 'satisfaction'
- \$908,225 in media value
- 12,009,042 media reach
- 332,000 website views
- 8,460 volunteer hours

The next four years

Priority areas outlined for the 2019 – 2023 festivals:

Program development:

- i. Curatorial framework to ensure balanced, feasible and appropriate program.
- ii. Development of key festival hubs to enhance visitor experience.
- iii. Inclusion of one standout blockbuster 'ARTtraction' style event or installation.
- iv. First Nations focus and cultural tourism opportunities.
- v. Build and maintain key program partners.
- vi. Local arts sector development including export readiness

Media and marketing:

- i. Increasing brand awareness marketing in the local area – including initiatives to keep the brand alive outside of the 10-day festival period.

- ii. Increasing and focussing marketing 'influence/behaviour change' efforts on the out-of-region tourism markets through an arts experience destination campaign.
- iii. Achieve targets as outlined in the Marketing and Communication Strategy 2019.
- iv. Work with Horizon partners to extend marketing reach and provide mutually beneficial outcomes.

Resourcing:

- i. Secure Council's ongoing financial and resourcing support
- ii. Secure multi-year funding from the State Government and Federal Government.
- iii. Increase corporate sector support via a dedicated Partnerships Officer.
- iv. Investigate philanthropic investment.
- v. Identify revenue streams for the festival.
- vi. Develop a Volunteer strategy.
- vii. Develop and maintain core festival team and appropriate Festival Director.

The long-term future

It is anticipated that, through implementation of the priorities outlined and through the investment and support of council, the following outcomes will be achieved:

- Firmly establishing the festival as a premier arts event on the national calendar.
- Providing pathways for local artists to develop content, skills and networks.
- Providing residents and visitors with unique arts experiences that engage and inspire.
- Showcasing the Sunshine Coast as a sophisticated cultural destination alongside spectacular geography.
- Providing strong social and community benefits for Sunshine Coast residents.
- Increasing the liveability and desirability of the region to positively influence destination choice of visitors, future residents and businesses.
- Delivering direct economic impact and tourism benefits.
- Leveraging significant funding from other levels of government, the corporate sector and philanthropic avenues.

Furthermore, Horizon will investigate alternative structural and investment options that support the future development and resourcing of the festival.

As Horizon's objectives are for the public good and deliver benefits for all residents within the region, one option is that Horizon adopt a business model as an entity independent from Council – a similar structure to the Sunshine Coast Arts Foundation and Bleached Arts on the Gold Coast.

A report on this option will be brought to council in due course.



Horizon Festival Opening Ceremony

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Background

The inaugural Horizon Festival was delivered in 2016 with results reported to council in January 2017 via the Ordinary Meeting process. This resulted in council endorsing *'the Horizon Festival as a Sunshine Coast Council supported event for the years 2017, 2018 and 2019'*.

The Sunshine Coast Council Operational Plan details the following objective for 2018-19;

- 2.3.11 Deliver the events program for the 2018 Horizon Festival

While the Sunshine Coast Arts Plan 2018 - 2038 articulates a number of actions that relate to Horizon, most specifically;

- 2.1.1 Continue to develop Horizon as the region's signature multi-arts festival
- 4.6.2 Continue to market and position Horizon festival at the Sunshine Coast as a premier arts and cultural experience and destination

This Horizon Festival Development Plan 2019 - 2023 is a key document in the process of seeking council support to deliver the festival until 2022 (financial years 2019/20 – 2022/23), as well as providing guidance and direction in decision-making for staff, stakeholders, sponsors and festival partners. The five-year plan has been informed by:

- Analysis of past-festival performance.
- Benchmarking against similar local government arts festivals.
- Community engagement of attendees, participants and volunteers.
- Sector engagement with Arts Queensland, Tourism and Events Queensland, Sunshine Coast Arts Advisory Board and the Major Events Board.
- Internal engagement with relevant stakeholders.

Horizon Profile

Mission

To deliver an annual festival of celebration, events and cultural programming that encourages community participation, capacity and celebrates diversity.

Vision

Horizon festival connects, disrupts and delights through arts, culture and creativity.

Objectives

- Provide showcase, collaboration and capacity development opportunities for local artists and arts workers.
- Deliver a premier festival that is a permanent fixture on the national arts calendar.
- Attract regional, national and international visitors to experience the vibrant creative soul of the Sunshine Coast.
- Generate regional, national and international interest in Horizon Festival and the Sunshine Coast region through the staging of signature events that are highly visually attractive and increase the value of iconic Sunshine Coast features.
- Nurture and develop local arts audiences by curating and delivering a high quality and diverse program of events.
- Foster community engagement with the arts through participatory works and experiences.

Legacy Goals

- Grow and strengthen the regional creative arts sector.
- Develop national and international networks, including export channels.
- Strengthen community pride and connectedness.
- Foster cultural tourism recognition, growth and maturity.
- Deliver hard infrastructure where possible.



Patterns in the Landscape Tidal / Manning Daly Art.

Achievements 2016 – 2018

As outlined in the festivals objectives and goals, and in-line with the Sunshine Coast Arts Plan 2018 – 2038, of the reason for Horizon is to increase the achievement and value of cultural outcomes for the region. However, due to the very nature of the festival which is to engage, delight and entertain, it also generates economic benefits, promotes and encourages social inclusion and well-being, brings communities together, fosters participation and enables residents to gain a wealth of experiences that would otherwise not be readily available or accessible.

It is noted that the first three figures below demonstrate the clear correlation between the level of spend on the festival (program and marketing) against attendee numbers.

Quantitative

1. Attendences - TOTAL **128,211**

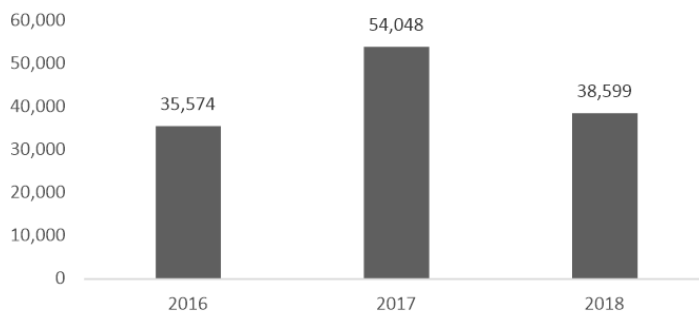


Figure 1 outlines the attendance levels for the past three years with the total being 128,211. *Note: In 2016 and 2017 Maroochy Music and Visual Arts Festival was part of Horizon – not held in 2018. In 2017 the international installation “Arboria luminarium” was part of the festival and attracted more than 12,000. This was in the program due to one large partnership valued at \$100,000 (cash).*

2. Festival spend v attendences

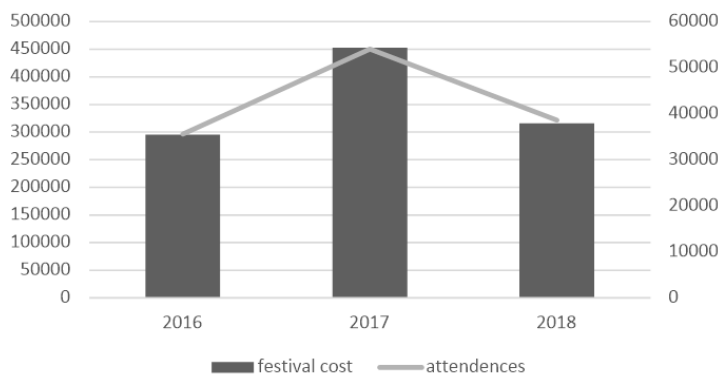


Figure 2 outlines the festival spend compared to attendee levels. This graph demonstrates that the more that is spent on the festival, the larger number of attendees and opportunity for increased economic impact.

3. % Visitors to the region (AVE. 22.3%)

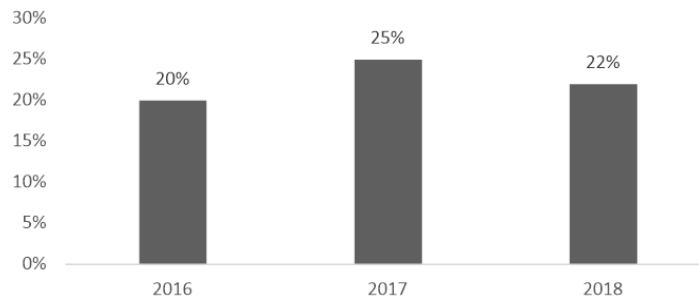


Figure 3 outlines the percentage of attendees who were visitors to the region. *Note: The 2018 festival experienced a 130% growth in primary purpose visitation.*

4. Activities per Festival

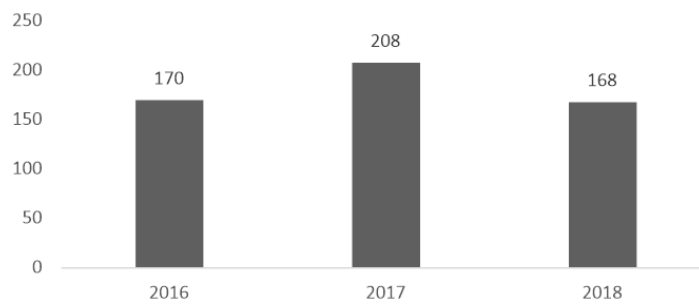


Figure 4 outlines the total number of activities per festival, both internally and externally delivered.

5. Events delivered by Council

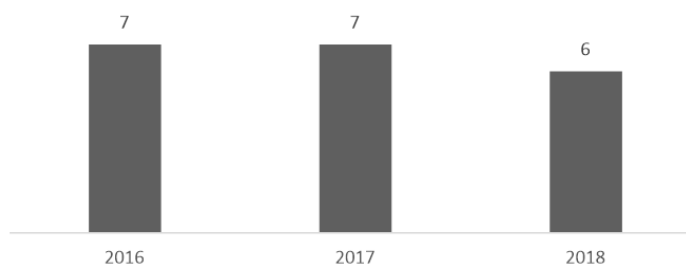


Figure 5 outlines the number of events delivered by council's Horizon team as part of the overall festival.

6. Festival participants

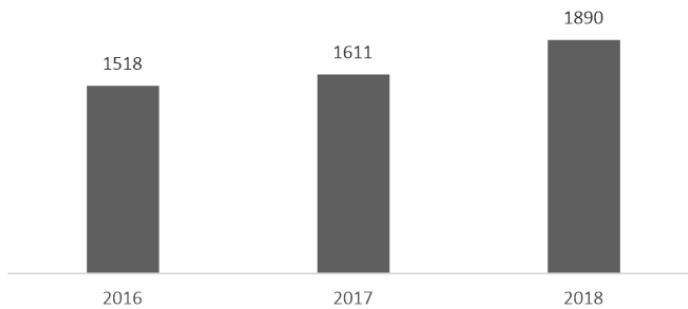


Figure 6 outlines the number of participants in the festival and includes artists, volunteers and event organisers.

7. Volunteer hours

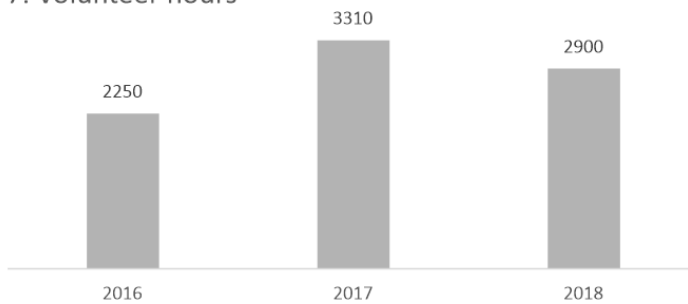


Figure 7 outlines the number of volunteer hours worked to deliver the festival. *Note: This number includes volunteers directly engaged by the festival team, as well as volunteers engaged by event organisers within the program.*

8. Number of Artists

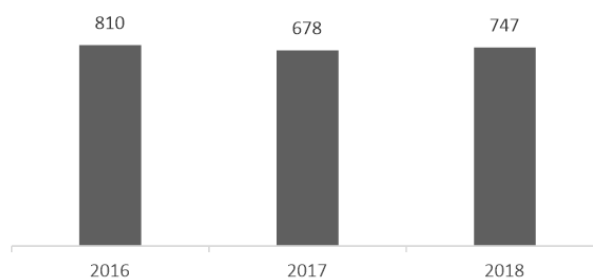


Figure 8 demonstrates the number of artists directly involved in presenting the Horizon festival program. *Note: this is a key KPI for Arts Queensland.*

9. First Nations - Projects | Artists

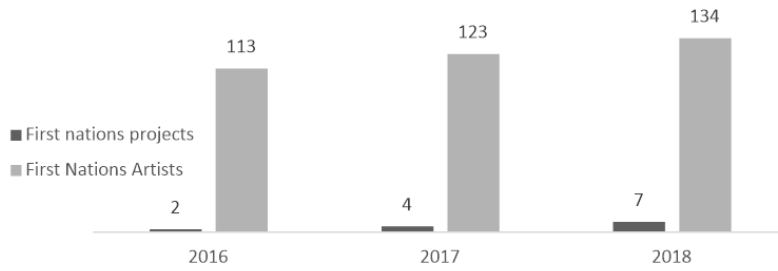


Figure 9 provides the number of First Nation’s projects and artists involved in the festival. This is a key priority of the festival and a customer driven demand as received through attendee feedback.

10. Disability - Projects | Artists

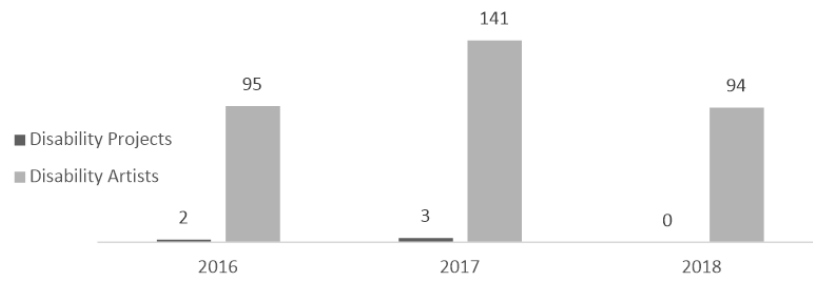


Figure 10 provides the number of projects and artists featuring people with disabilities.

11. Average Audience Satisfaction 2016-18

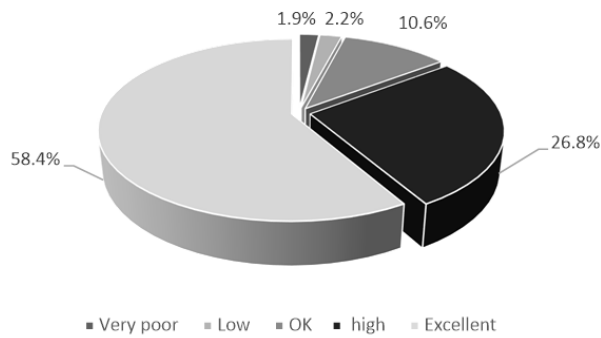


Figure 11 outlines the combined attendee satisfaction level at 87% good or excellent.

12. Media Value and Reach

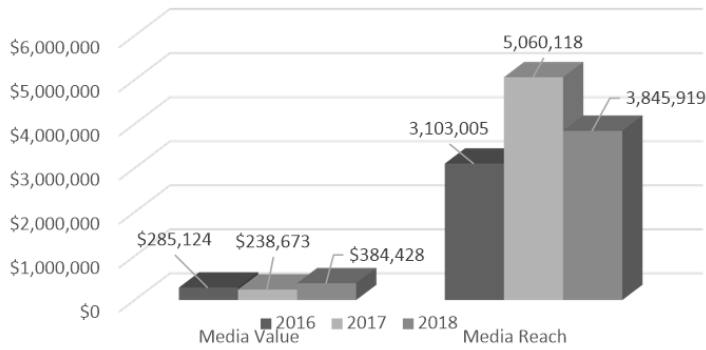


Figure 12 demonstrates the media value and reach of each festival. The combined media value of the three festivals is \$908,225 with the total reach at more than 12 million.

Note: Reach is calculated using print circulation (number of copies printed), average radio and TV timeslot ratings data and number of unique daily visitors to an online news site.

13. Social Media

(Facebook , Twitter and Instagram)

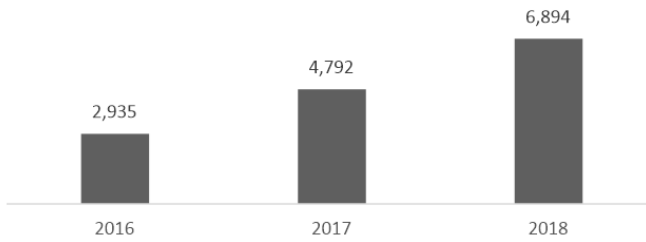


Figure 13 outlines the numbers of combined followers on Facebook, Instagram and Twitter at the conclusion of each festival.

14. Website page views

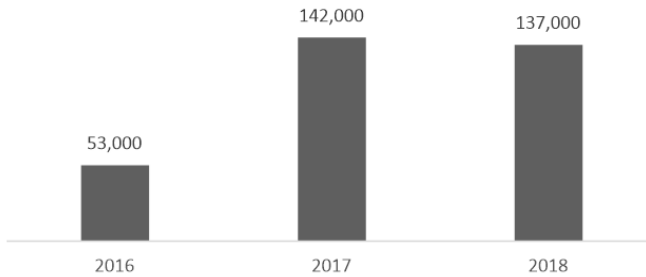


Figure 14 outlines the numbers of web page views for www.horizonfestival.com.au for each festival.

15. Cultural Vitality

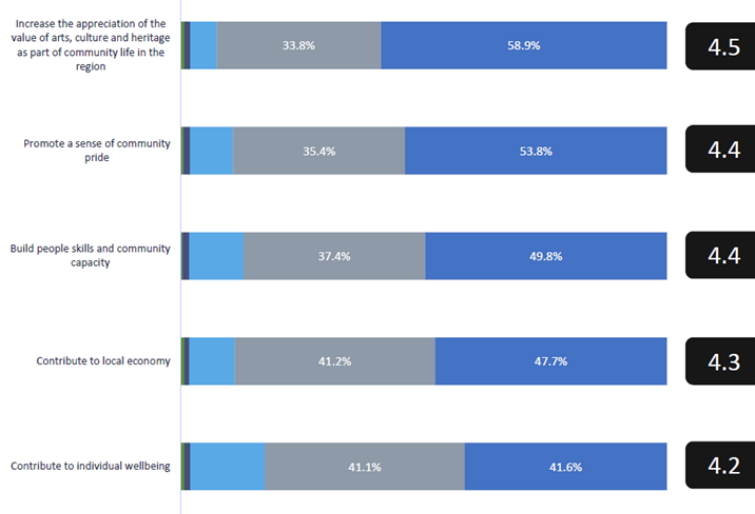


Figure 15 outlines the *cultural vitality score for the 2017 and 2018 festivals. It demonstrates that attendees provided strong levels of agreement with all the statements relating to social and community benefits and well-being that are delivered by arts and cultural programs in the Sunshine Coast.

Agreement was strong in relation to the fact that these programs ‘increase the appreciation of the value of arts, culture and heritage as part of community life in the region’. Attendees also agreed that the programs help to promote a sense of community pride and help to build people skills and community capacity.

*Note: * Cultural Vitality is defined as: evidence of creating, disseminating, validating and supporting arts and culture as a dimension of everyday life in communities (Jackson et al 2006). This is measured through the public value created in the community from Sunshine Coast Council’s investment in arts, cultural and heritage programs via a survey where attendees agree to 5 statements relating to; individual well being, local economy, community pride, capacity building and appreciation of the arts, on a scale of 1 = strongly disagree to 5 = strongly agree.*

16. Community Pride

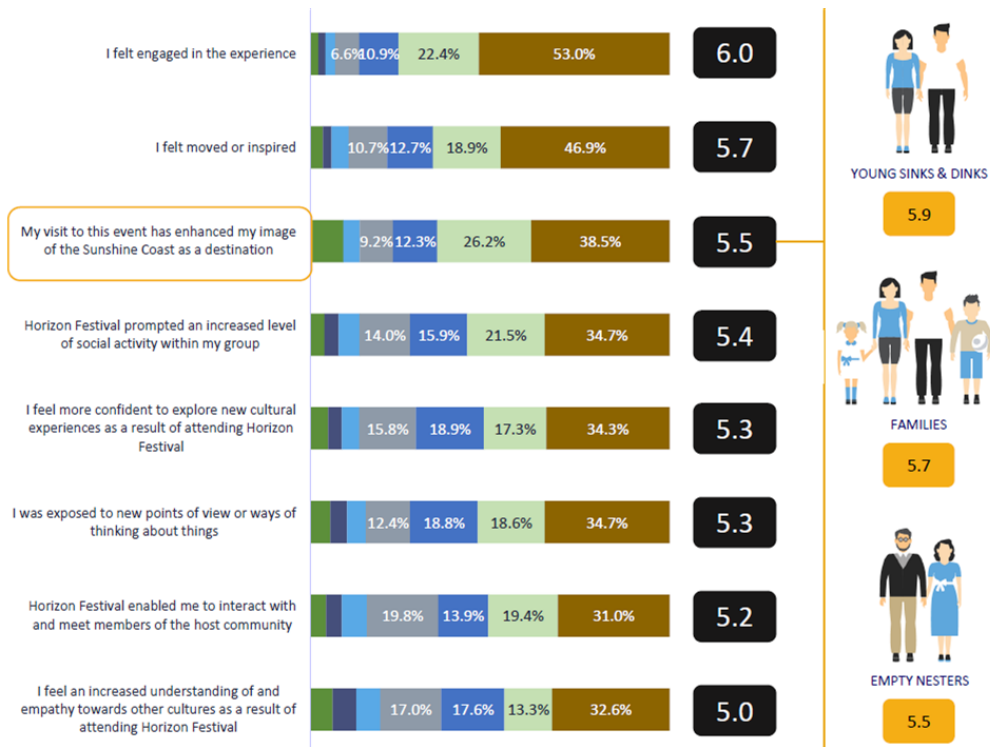


Figure 16 outlines 2018 respondents' community pride levels where attendees were asked to rate their agreement with a number of statements relating to the social and community impacts associated with attending the Horizon Festival.

The strongest agreement (6.0) was given to the idea that attendees 'felt engaged in the event'. Overall, more than 75% agreed with this statement.

The next highest agreements were with the idea that attendees 'felt moved or inspired' and that through their attendance, 'their perception of the Sunshine Coast was enhanced'.

The three segments provided similar ratings across the statements, with the exception of the view that 'their perception of the Sunshine Coast was enhanced' – which had stronger agreement from the Young Sinks and Dinks.

Further to the information outlined above, Horizon was awarded Best Achievement in Marketing, Communication or Sponsorship at the 2018 Australian Event Awards. The award took into consideration the style of campaigns, strategies, innovation, partnerships, challenges overcome, environmental sustainability and corporate social responsibility achieved by the nominated events. It was a significant achievement to be named a finalist in the category, but the Horizon team won the

award alongside some strongly branded and heavily funded finalists such as 2018 Gold Coast Commonwealth Games sponsorship program and the Cellarmasters Touring Cellar Door.

Qualitative

Key themes emerging from attendee feedback reveals:

- Key benefits expressed were: perception of the Sunshine Coast was enhanced; felt increased community connection / social belonging; increased the appreciation of arts, culture and heritage as part of community life; felt engaged in the event; felt moved or inspired.
- Majority of feedback was regarding the need for increased marketing and promotion: Need easier access - more specific information in relation to the festival program, improved promotion (around 20% of all respondents).
- Greater variety of food stalls.
- More involvement by Traditional Owners.
- Stronger focus on children's events and activities with earlier scheduling for children to attend.

Key themes emerging from participant feedback reveals:

- Key benefits expressed were: access to new audiences; connections and networks established; increased profile of artists/events.
- Need to have a greater emphasis on social media for communication and marketing activities.
- The quantity of marketing and promotion could be improved.
- Need increased signage around events.



Priorities 2019 – 2023

Horizon priorities for 2019-23 need to both align to council's strategic focus area and take advantage of planning, regional and sector opportunities. These include:

- The endorsement of the region's first ever Sunshine Coast Arts Plan 2018 – 2038 with support from the Sunshine Coast Arts Advisory Board [2018].
- Australian Performing Arts Conference and Performing Arts Exchange being held in Caloundra during Horizon [2019].
- New Maroochydore CBD coming online offering opportunities for a centralised hub and more urban and sophisticated program offerings [from 2019].
- Airport expansion offering increased tourism visitor opportunities [2020].

A prioritised and well thought out approach to program development, marketing and resourcing Horizon, aligned to the strategic and sometimes opportunistic (flexible) approach will help solidify the longevity of Horizon and the cultural vitality it brings to the region.

Program Development

The development of a curatorial framework is key to the festival's ability to directing the momentum of the past three years towards the growth and development of Horizon into a premier arts festival within Australia.

While this outcome will help shape our creative identity and legacy across the Sunshine Coast region, the framework itself is key to securing increased support, resourcing, revenue and funding.

Horizon's vision, interpreted through the Festival Director's lens, is brought to life through a curatorial framework encompassing the setting of strategic priorities, developing balanced program and ongoing analysis and review.

The strategic programming priorities can be delivered by ensuring the festival program aligns to five pillars:

1. Participation/Community;
2. Participation/ Capacity Building;
3. New Work/Artistic Innovation;
4. Access/Geographic Reach;
5. Education.

The pillars reflect the outcomes of the Arts Plan and the broader vision of the Corporate Plan and Social Strategy.

These pillars are further supported by four program classifications:

1. Sunshine Coast Artists;
2. Signature Project;
3. Geographic Spread;
4. Excellence.

The secondary level of classification is crucial in making decisions about which programs can and should move ahead in a given festival framework. These include financial viability, organisational capacity and partnerships.

This second tier will also consider national and international networks to develop and tour new works and support emerging artists.

Horizon offers a platform to showcase, empower, connect and grow local cultural creative through development and participation. Sector development will remain integral to the programming mix to meet corporate priorities while ensuring a fertile supply of talent and new work for future festivals and cementing the region's identity as a creative hot spot.

One new concept that Horizon will develop from 2019 is geographical festival hubs. To manage expectations, these locations will consider Principal, Major and District Activity Centres, arts practice clusters, divisional aspects, funding opportunities and partner requirements. The new Maroochydoore CBD for example, offers opportunities for a centralised hub and more urban and sophisticated program offerings. These hubs will be key focus areas for programming which will allow an improved visitor experience and a greater sense of festival vibe, while also reducing the cost of activating many sites.

The need for one standout blockbuster 'ARTtraction' style event or installation is supported by attendance figures from similar activities at previous and other festivals. It is a key ingredient for bringing attendees (and economic impact) to region by attracting media attention to the festival and putting a spotlight on local emerging artists.

This component is reliant on significant funding. For example, Arboria Luminarium in 2017, which attracted 12,000 people over a 10-day period, was made possible due to a \$100,000 partnership.

The idea of a blockbuster attraction is being investigated with a view to working with Council's Major Events team for a potential funding partnership that would see value in an investment into the overall program to expand significant offerings across multiple hubs.

The Sunshine Coast Council acknowledges the traditional Country of the Kabi Kabi and the Jinibara Peoples of the coastal plains and hinterlands of the Sunshine Coast and recognises that these have always been places of cultural, spiritual, social and economic significance. As such, Horizon is committed to developing pathways and providing opportunities for Aboriginal and Torres Strait Islander arts practitioners and communities to develop and present their stories and performance during the event. Horizon recognises the value of cultural tourism and will continue to work with the traditional custodians to develop significant artwork, unique experiences and transformative legacy for the region's First Nations peoples.

Program partnerships with local, intrastate and interstate collaborators are a key to extending the festival program while also increasing the reach of the Horizon brand. These opportunities range from festival partners keen to tour work. These possible partners include Darwin Festival, Cairns Festival, Melbourne Writers Festival, Cairns International Art Fair and Garma as well as venues with rolling programs including Tivoli Theatre, Queensland Performing Arts Centre and Sydney Opera House. It is also critical to continue to umbrella (and in some instances have input) programming presented at local venues including Solbar, Bison Bar, The Shed, Venue 1114 and The Events Centre.

Finally, to build awareness of and access to the Horizon Festival, while also showcasing new and rising talent, the festival could partner with key fringe festivals (eg. Adelaide Fringe Festival) that host awards. The Horizon Festival could be a sponsor of one of the awards which would result in the winning artist/s/company to tour to the Sunshine Coast. The cost to Horizon would be a bursary style subsidy for travel, accommodation and on-costs of their season at Horizon.

Furthermore, opportunities to co-invest, co-commission works of various scale exist with both Queensland and interstate partners including Brisbane Festival, Home of The Arts (HOTA), La Boite, Melbourne Fringe Festival and other regional councils.

Program development key priorities

- i. Curatorial framework to ensure balanced, feasible and appropriate program.
- ii. Development of key festival hubs to enhance visitor experience.
- iii. Inclusion of one standout blockbuster 'ARTtraction' style event or installation.
- iv. First Nations focus and cultural tourism opportunities.
- v. Build and maintain key program partners.
- vi. Local arts sector development including export readiness

Horizon Festival Curatorial Framework

The below decision-making tools ensure the festival is maintaining and responding to strategic priorities whilst delivering a balanced and feasible program.

STAGE 1 – STRATEGIC PRIORITIES				
Strategic Priorities	Performance Indicators	Yes/No	Notes	Work
Participation/Community Reach	Develops a framework for artists, community and audience to come together to create works			
	Focuses on providing experiences in the process of making a new work			
	Public participation event			
Participation/Capacity Building	Creates and develops a high-quality program of culture in a regional centre			
	Supports community arts workers and performers			
	Provides a space for local artists to create and discuss work with artists of national and international reputation			
	Shared authorships with community input, that values the importance of local storytelling & connection to audience			
New Work/Artistic Innovation	Commissioned work			
	Promotes and celebrates emerging artists in one or a number of events			
	Festival environment that enables artistic innovation			

	Creates an environment that is financially and artistically viable to create experimental cultural work			
Access/Geographic	Explore the scale of the Sunshine Coast			
	Reduces remote and disadvantaged communities' isolation through cultural development and support			
	Provides a network of cultural exchange and development across locally, nationally and globally			
	Provides a space for local artists to create and discuss work with artists of national and international reputation			
Education	Workshops, masterclasses, rehearsals, mentorships			
	School-based and Institutional residencies			

STAGE 2 – BALANCED PROGRAM				
Strategic Priorities	Performance Indicators	Yes/No	Notes	Work
Sunshine Coast Artists	Links Sunshine Coast stories with national, international and regional conversation and practice			
	High-level community-engaged contemporary art practice			
	Make new contacts and networks for career development			
	Brings emerging, community, and professional artists together on one platform			

	Upskills and mentors Sunshine Coast artists			
	Employs local and Sunshine Coast artists and arts workers			
Signature Project	Showcases iconic Sunshine Coast Feature/s			
	Attracts regional, national and international visitors			
	Strengthen community pride and connectedness			
Geographic Spread	Ensures a rotation of offerings across the region			
	Digital programming content			
	Reduces isolation and enables access			
Excellence	Achieves artistic and creative excellence			
	High production standards			
	Diverse and highly creative team			
	Umbrella program curated to complement the core program			

STAGE 3 – FEASIBILITY						
Feasibility Indicators	Components	Low (<20k)	Medium (20- 65k)	High (65-120k)	Notes	Cash Estimate
Resourcing	Programming cash budget					

	Organisational and staffing capacity					
	Marketing resources					
Income Potential	Sponsor/Partners cash income (Corporate, Philanthropic, Project Grant, Council)					
	Collaborations and in-kind income (Participating Arts Organisations, Venues, Council, Corporate and Media Partners)					
Marketability/Popular	Audience Potential					
	Media Potential					

Marketing and Media

The Marketing and Communication Strategy 2019, supported by the Tactical Marketing Plan (including Digital Strategy) - and Communication Plan develops the strategic and practical approach for growing the Horizon brand including marketing and media, partnerships, targets and evaluation.

Horizon's marketing and communication strategy builds on the significant brand equity developed over the festival's first three years. The strategy further develops and delivers a significant destination campaign increasing brand awareness both locally and within Australia whilst extending the marketing reach and appeal of the festival. Through increasing and focussing marketing efforts on the destination approach to the out-of-the-region market, the economic impact of the festival, and thus its attractiveness to tourism funding bodies, can also be increased.

All marketing and communication activity for Horizon 2019 will support the following objectives:

- Increase the Horizon Festival 'umbrella' brand awareness locally and nationally.
- Convert awareness to attendance, resulting in ticket sales and attendance figures that exceed set audience KPIs.
- Drive intra and interstate travel to the Sunshine Coast for the Horizon Festival.
- Increase audience engagement with Horizon brand touch-points and online program.
- Maintain current ratio of local, intrastate and interstate audiences.
- Maintain and grow positive perception of Horizon amongst participants.
- Improve communications with artists and event participants prior to and during event to enhance the artist experience of Horizon.

Horizon was awarded Best Achievement in Marketing, Communication or Sponsorship at the 2018 Australian Event Awards against finalists such as 2018 Gold Coast Commonwealth Games sponsorship program and the Cellarmasters Touring Cellar Door demonstrating the strength of the festivals' marketing strategy, assets and team – and the momentum the Award win has created – and which we will be taking full advantage in 2019 and ongoing.

Key Marketing Assets

- Established visual brand (look and feel)
- Website - horizonfestival.com.au
- Facebook: @horizonartfest
- Instagram: @horizonartfest
- Twitter: @horizonartfest
- Printed Program – to be released 20 June, 2019

In addition to the Horizon owned assets outlined above, through partnerships, Horizon can access the platforms and database of our partners.

Audience Analysis

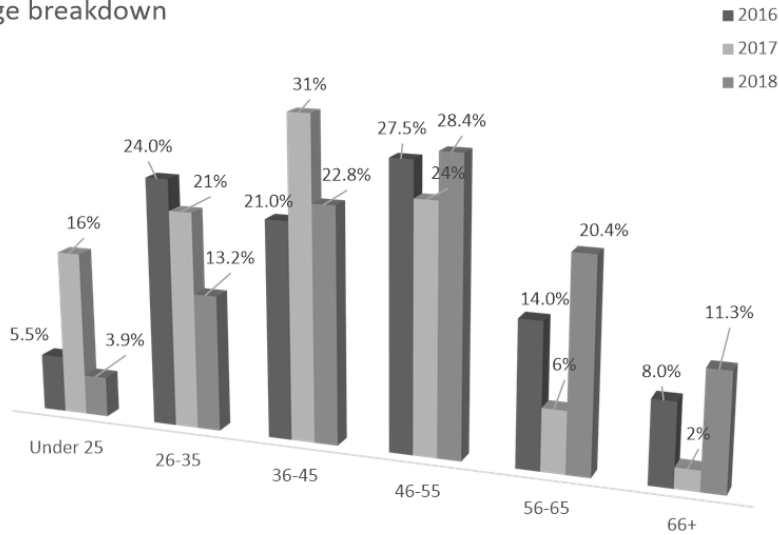
In considering Horizon Festival audiences, it is important to recognise that these groups are not simply marketing targets. For maximum appeal, the festival will be programmed with these audiences in mind, in some instances, in consultation with these audiences, and to grow audiences.



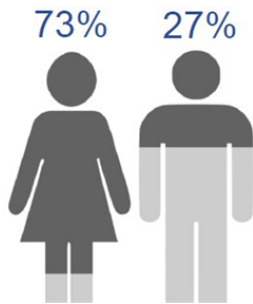
Marketing and communication activity for Horizon in 2019 will focus on extending the audience reach and appeal of the festival. This will include consolidating the currently engaged audience as well as reaching out to new audiences.

Figure 17 below outlines the age demographic of each festival. *Note: The larger numbers of Under 25's in 2017 are attributed to the 'Arboria luminarium' installation. Also, the decreases in the 26 – 35 age group for 2018 are attributed to the Maroochy Music and Visual Arts Festival not running.*

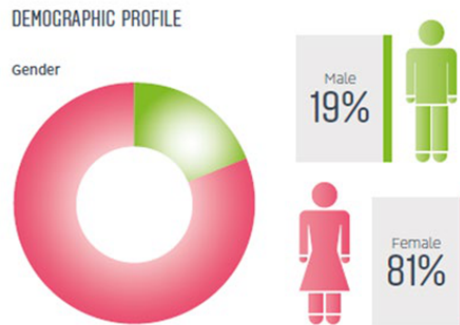
17. Age breakdown



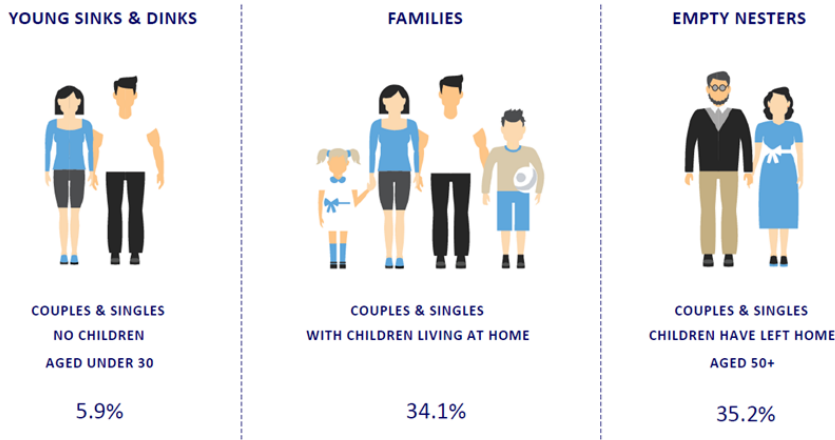
18. 2017 Gender Profile



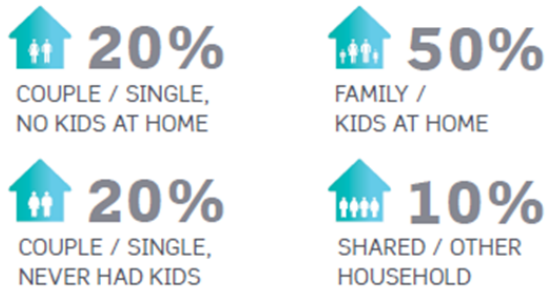
19. 2018 Gender Profile



20. Target Segments Profile 2018



21. Household Composition 2018

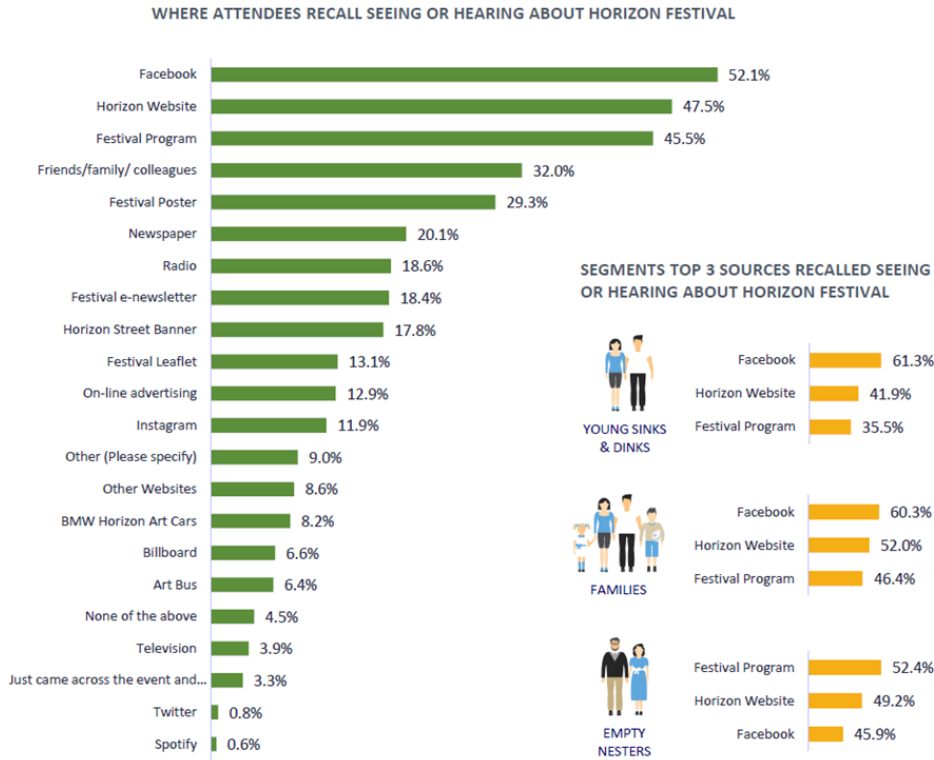


In developing new audiences and growing our audience base, Horizon needs to look further than a lack of brand awareness and consider potential barriers to arts participation in our communities. The Australia Council for the Arts (2017) [National Arts Participation Survey](#), revealed the following insights about barriers to participation:

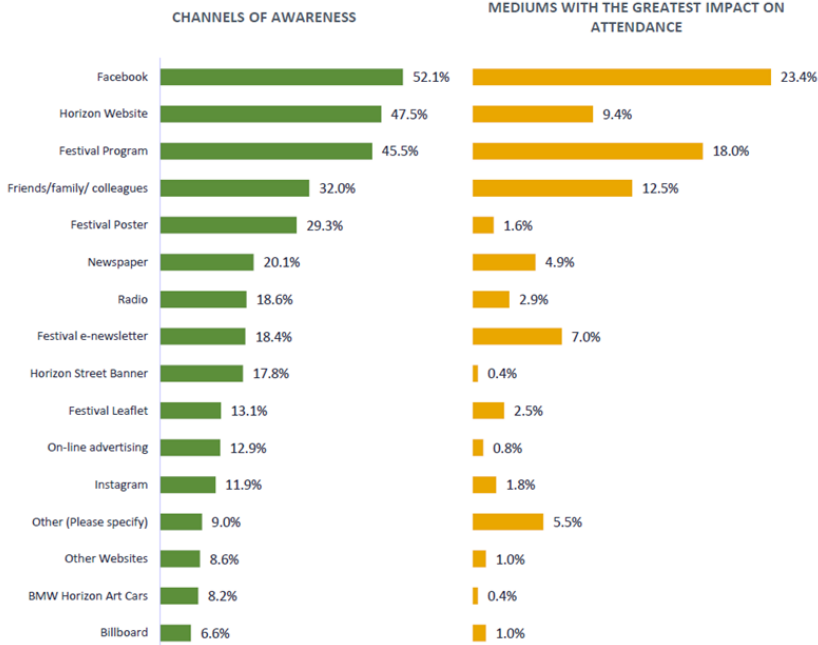
- People who are less engaged believe that:
 - Arts are too expensive.
 - Arts attract people who are elitist and pretentious.
 - Arts are not really for people like me.
- People who are less engaged with the arts are more likely to have entrenched perceptions of them as ‘opera and ballet’ – with work still to be done to shift perceptions about the true breadth of the arts so that everyone can feel a point of connection to creative life in Australia.

Horizon will also consider a recent body of research from Australia Council for the Arts, a *National Arts Participation Survey: Culture Segments Australia*, which looks at audience segmentation by motivation for arts participation. Horizon hopes to overlay this research with its current audience analysis, to help better understand our existing audience, establish areas for potential growth and plan for how to best use these audience groupings moving forward. A Horizon specific analysis of the Culture Segments audiences can be found in the Marketing and Communication Strategy 2019.

22. Awareness Profile



23. Awareness v. Attendance Profile



24. Net Promoter Score



Figure 24 above outlines the net promoter score (NPS) for the 2018 festival. The NPS allows for the measurement of an event’s performance through the eyes of its attendees. It is based on the view that all attendees can be segmented into one of performance through the eyes of its attendees. It is based on the view that all attendees can be segmented into one of three categories:

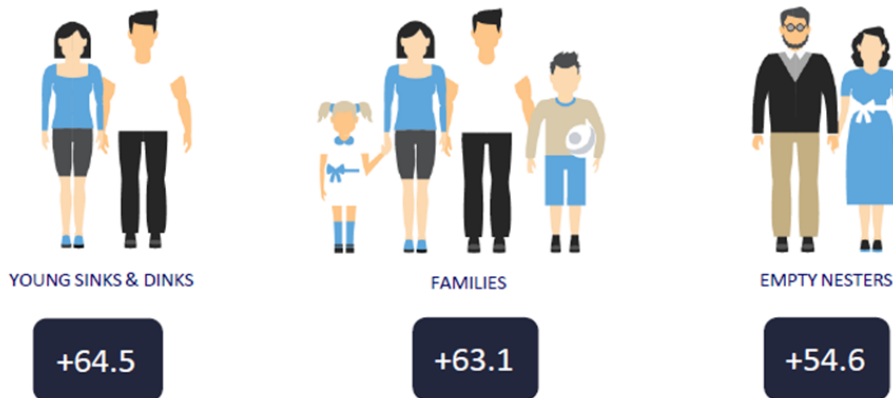
- Promoters (rating score 9-10) are classified as loyal enthusiasts who will keep attending and refer others, fuelling growth.
- Passives (score 7-8) are often satisfied but unenthusiastic customers who are vulnerable to competitive offerings.
- Detractors (score 0-6) are unhappy consumers who can damage the Horizon Festival brand and hinder growth through negative word-of-mouth.

The NPS is calculated by subtracting the percentage of Detractors from the percentage of Promoters. The difference between the two is the NPS.

The Net Promoter Score of +57.1 represents a very strong level of positive advocacy generated amongst attendees at Horizon Festival. Overall, nearly 70% indicated that they would be likely to positively advocate their experience to others.

Figure 25 below outlines the NPS scores amongst the target segments and reveals a significant difference between the highest and lowest Net Promoter Scores provided by the segment groups, with Young Sinks and Dinks providing an NPS of +64.5, while Empty Nesters gave an NPS of +54.6.

25. Net Promoter Score / Segments 2018



Tourism Data

Horizon recognises the importance of the tourism market to the festival's success and longevity, as well as the funding opportunities it provides.

Australia Council for the Arts and Tourism Research Australia outline the following regarding how in Australia and around the world, cultural tourism is growing:

- In terms of overnight stays, cultural tourism is growing more quickly than tourism overall, increasing in 2015 by 15% for international visitors and 11% for domestic visitors, compared to 8% and 7% respectively for overall tourism.
- This trend is supported internationally. Cultural tourism comprises 37% of world travel and is growing at a rate of 15% year on year.
- Across Australia, international cultural tourists spend 24% more and stay 24% longer than international tourists generally. And domestic travellers staying overnight at a destination spend 56% more and stay 37% longer when they incorporate cultural activities into their visit.
- Overall, interest in cultural activities has jumped among international visitors, particularly those coming from Australia's top source markets, i.e. the countries where the greatest numbers of tourists originate. These markets include Hong Kong, South Korea, Japan, India and China.
- International visitors are especially interested in finding out more about Aboriginal heritage and unique culture.
- Over one million international tourists attended festivals, fairs and cultural events in 2017, an increase of 61% since 2013.
- There is strong and growing potential for the arts to help drive regional tourism. International arts tourists are more likely to visit regional Australia than international tourists overall.

Horizon will work closely with Tourism Events Queensland and visit Sunshine Coast to capitalise on these trends.

Positioning and Key Messaging

The Horizon Marketing and Communication Strategy 2019 has identified the following key messages:

- Horizon Festival - visual art, music, words + ideas, film, fashion, art + tech, performing arts, street art and creative workshops.
- The Horizon Festival is the signature multi-arts festival for the Sunshine Coast region.

Over 10 arts-fuelled days, the Sunshine Coast plays host to a curated program of art, including visual art, music, words + ideas, film, fashion, art + tech, performing arts, street art and creative workshops.

- Horizon supports local artists to develop their own independently-produced work,
- Horizon builds the capacity of local creative talent by celebrating local artists alongside national and international guests.
- Horizon is the platform for quality art and culture experiences right here on the coast.
- Horizon is the platform for both the popular and the experimental and emerging.
- Horizon collaborates with a number of well-established events such as the Sunshine Coast Arts Prize and Q-Music through BIGSOUND.

- Horizon nurtures a dialogue between art, people and place by encouraging artists to create work that explores their relationship to the natural or urban landscape and local stories.

Media and marketing key priorities

- i. Increasing brand awareness marketing in the local area – including initiatives to keep the brand alive outside of the 10-day festival period.
- ii. Increasing and focussing marketing ‘influence/behaviour change’ efforts on the out-of-region tourism markets through an arts experience destination campaign.
- iii. Achieve targets as outlined in the Marketing and Communication Strategy 2019.
- iv. Work with Horizon partners to extend marketing reach and provide mutually beneficial outcomes.

Resourcing

The level of benefits Horizon can deliver are limited only by the level of investment into the festival. The opportunity to extend our budget through funding and grants, corporate sector, philanthropic support and earned income is essential to the future development of the festival.

There have been some challenges in applying a strategic approach to attracting corporate sector support and funding and managing the ongoing relationship such partnerships demand if they are to be successful.

Corporate sector partnerships require specialist skill. This needs to be resourced in Council will be requested to provide additional funding for the recruitment of a Partnerships Officer to take on this role. In order to maintain and develop these partnerships into the future it is vital that this Officer is supported and retained in the team.

Funding and grants bring other challenges. They are highly competitive and do not provide long-term certainty - essential to long term planning. They also require a concerted effort of work to identify and prepare together with the funding party, applications and reports. While larger multi-year funding will be proactively sought with State and Federal Government agencies, council should not be competing against potential festival participants for the same external grants. This is detrimental to the festival program, reputation and long-term sustainability. Horizon instead intends to assist participants in submitting their own external grants which will be both beneficial for the festival program and council’s reputation.

The building and development of a skilled core festival team, led by an appropriately qualified Festival Director, has also been identified as crucial to the success of the festival. This will provide the ability to develop continuity and intellectual property as well as maintain knowledge of the sector and relationships with stakeholders.

Additionally, the development of a Volunteer Strategy will create a core group of on the ground support and assistance for delivery across the festival on council delivered and externally delivered events. These volunteers will also serve as brand ambassadors and strengthen word of mouth awareness of Horizon locally.

The festival understands the current economic climate and is committed to securing external funding sources to grow Horizon into the future.

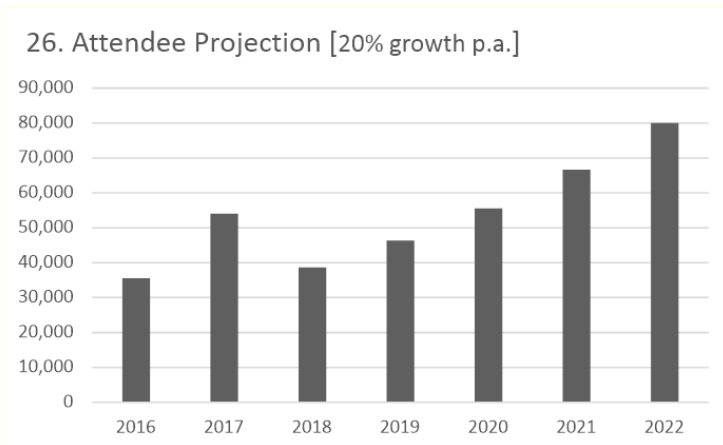
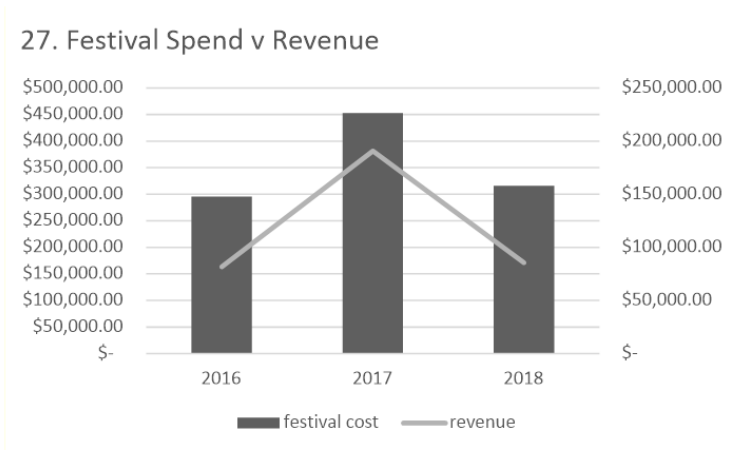


Figure 25 above outlines the festival attendance projections till 2022 (based on 20% per annum). Total attendance from 2016-18 festivals is 128,211. In the projection above, the total after seven festivals would be 376,850. For comparison, Gold Coast’s Bleach festival has had 370,000 attendees after six festivals (2012-17; not including 2018 Commonwealth Games iteration). Figure 20 below provides the revenue against the festival spend [the 2017 outlier is the result of one major partnership of \$100,000 cash]. When seen next to the attendance graph, the correlation between festival cost and attendee numbers is clear.



28. Projected Revenue

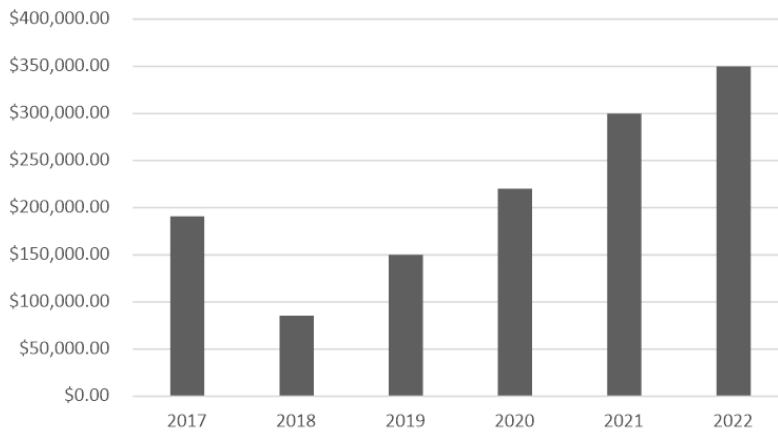
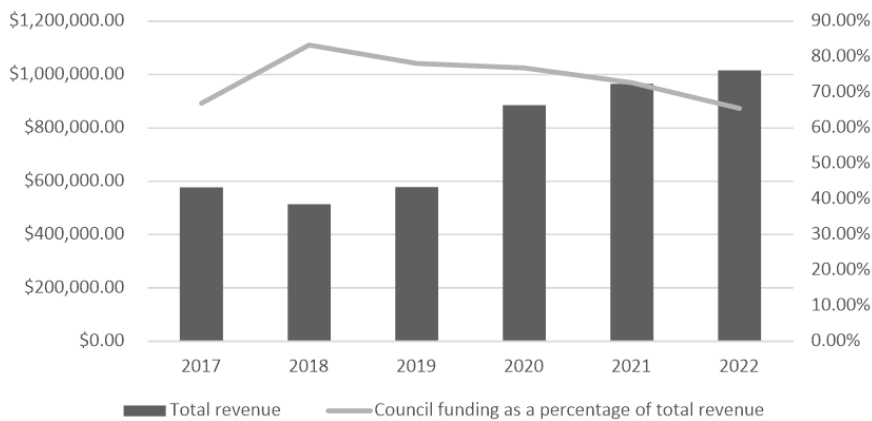


Figure 27 above demonstrates the projected revenue into the future. This revenue is all funds received outside of Horizon’s core budget.

Further, figure 28 below outlines the actual and projected revenue growth of Horizon. Further, the orange line demonstrates the level of council funding as a percentage of total festival spend. As indicated, while there is an increase in council funding for this next three year period, the projections suggest a reduced reliance on council funding into the future.

29. Festival Revenue v. Council Funding %



Resourcing Key Priorities

- i. Secure council support and resourcing
- ii. Secure multi-year funding from the State Government and Federal Government.
- iii. Increase corporate sector support via a dedicated Partnerships Officer.
- iv. Investigate philanthropic investment.
- v. Identify revenue streams for the festival.
- vi. Develop a Volunteer strategy.
- vii. Develop and maintain core festival team and appropriate Festival Director.

Outcomes

This Horizon Development Plan 2019 – 2023 will guide the development and maturity of the festival for the next three year endorsed delivery and funding period.

Its implementation, as a whole and as outlined, will enable the following outcomes to be achieved:

- Firmly establish the festival as a premier arts event on the national calendar.
- Provide pathways for local artists to develop content, skills and networks.
- Provide residents and visitors with unique arts experiences that engage and inspire.
- Showcase the Sunshine Coast as a sophisticated cultural destination alongside spectacular geography.
- Provide strong social and community benefits for Sunshine Coast residents.
- Increase the liveability and desirability of the region to positively influence destination choice of visitors, future residents and businesses.
- Deliver direct economic impact and tourism benefits.
- Leverage significant funding from other levels of government, the corporate sector and philanthropic avenues.

Furthermore, Horizon will investigate alternative structural and investment options that support the future development and resourcing of the festival.

As Horizon’s objectives are for the public good and deliver benefits for all residents within the region, one option is that Horizon adopt a business model as an entity independent from Council – a similar structure to the Sunshine Coast Arts Foundation and Bleached Arts on the Gold Coast.

This structure would allow Horizon to access funding sources not currently accessible, such as philanthropic avenues, significant multi-year State and Federal organisational funding, and may make corporate investment more attractive.

This structure would also allow Horizon to be more agile in its operation, particularly when negotiating to program and deliver creative and unique experiences.

To be considered for organisational funding from Arts Queensland and Australia Council, two years of audited financial records are required. Noting this requirement as well as the funding round dates, if Horizon were to become an independent entity in 2021, it would be eligible to apply for funding in the 2024 round.

A report on this option will be brought to council in due course.



Puppets in Harmony / Avid Property Group.