



**A R T S C O A S T**  
**Audit and Opportunities Report**

www.sunshinecoast.qld.gov.au  
mail@sunshinecoast.qld.gov.au  
T 07 5475 7272 F 07 5475 7277  
Locked Bag 72 Sunshine Coast Mail Centre Qld 4560

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### **Acknowledgements**

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This document was prepared by *JOC Consulting*, a creative urban planning firm who specialise in strategy, engagement and activation.

### **Disclaimer**

Information contained in this document is based on available information at the time of writing. All figures and diagrams are indicative only and should be referred to as such. While the Sunshine Coast Council has exercised reasonable care in preparing this document it does not warrant or represent that it is accurate or complete. Council or its officers accept no responsibility for any loss occasioned to any person acting or refraining from acting in reliance upon any material contained in this document.

## **Acknowledgement of Country**

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.

“ For a dynamic, sustainable region, at the centre has to be the heart and soul of this Country, and that is the First Nations peoples.

Including our intellectual property and songlines about creation of this Country that have been passed down through Traditional Owners.”

*First Nations focus group participant*

Cover image:  
*Sand, Horizon Festival 2022*  
Photographer: Alain Bouvier

Inside Cover Image:  
*Dawn Awakening, Horizon Festival 2022*  
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Image: Mona Ryder. Exhibiting artist within the Fabric program | Photo: Mark Sherwood

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# 1. INTRODUCTION

## 1.1 THE SUNSHINE COAST ARTS PLAN

In 2018, Sunshine Coast Council (Council) adopted the *Sunshine Coast Arts Plan 2018-2038 (Arts Plan)* to grow and strengthen the local arts sector. It provides a 20-year vision to guide Council's future priorities, programs, and investment in the arts.

### The four goals within the Sunshine Coast Arts Plan are:

- Local artists and artistic content is developed and celebrated.
- Arts audiences and creative opportunities flourish through investment and development.
- Dedicated networks of places and spaces for artists to connect, create and collaborate.
- Art and creativity is embedded in the identity and experience of the Sunshine Coast.

## 1.2 THE PURPOSE OF THIS REPORT

Since the establishment of the Arts Plan, Council has set up structures and delivered numerous initiatives and programs that deliver on its goals (refer to section 3.11 of this report).

The Arts Plan is now under review, in accordance with a monitoring and evaluation framework, to ensure the vision and roadmap remains current and effective, particularly in light of the impact of the COVID-19 pandemic on the sector.

In an effort to improve Council's understanding of, and service to, their local creative communities, Council has commissioned *JOC Consulting* to deliver an audit and provide recommendations on achievements, sentiment and sector development.

The purpose of this report is to collate research and provide an evidence base for Council to inform an update to the Arts Plan, and the development of the ArtsCoast brand.

This report comprises a snapshot of the creative arts sector on the Sunshine Coast, how it has evolved since the inaugural Arts Plan 2018-2038 was adopted by Council, and what future opportunities have been identified through consultation.

## 1.3 EXECUTIVE SUMMARY

The Sunshine Coast is on a journey of creative transformation. With a population expected to swell to 550,000 people by 2041, and projected demographics becoming younger and more diverse, the social fabric of the region is shifting.<sup>1</sup> Concurrently, major developments such as the \$2.5 billion Maroochydore City Centre is changing the face and footprint of the region. With this growth comes the potential for a boost and diversification in audiences of the arts, and by extension, an opportunity to develop new cultural infrastructure and experiences that place the Sunshine Coast on the map as a cultural destination.

From the beach to the hinterland, generations of artists have drawn inspiration from the region's natural setting. As new residents and visitors flock to the Sunshine Coast, there is an increasing demand for authentic cultural experiences.

National, state, and local research indicates that people's attitudes towards and participation in the arts is increasing. 84% of Australians acknowledge the range of positive impacts the arts have on our lives, communities, and our national identity (up from 75% in 2016).<sup>2</sup>

The soul of our community is our flourishing arts ecology: nurturing connections, promoting experimentation and inspiring collaboration.

*Sunshine Coast Arts Plan  
2018 - 2038 Vision*

Council developed its first Arts Plan in 2018 to set the foundations for the arts sector to flourish in the region – and flourish it did. The insights in this report paint a picture of an arts ecology that is evolving and diversifying with great momentum. The 2022 Arts sector survey data indicates that since 2017, there are more people working full time in the arts (currently 42%, up from 31% in 2017), more of the sector now generate income from their creative work, and arts workers are more dispersed across the region.

As a direct result of the Arts Plan, there are more arts venues and facilities, more creative programming, and more training opportunities to enable the arts sector to thrive. Since the Arts Plan was established in 2018, Council has delivered 733 training development opportunities to 8,310 artists, which is evidence of this.

The Sunshine Coast's signature arts and cultural event, *Horizon Festival*, has gone from strength to strength. In 2022, it attracted an audience more than 21,000 and supported 261 paid local artists and arts workers with its diverse programming, that showcased the best creative experiences the Coast has to offer.

The establishment of the *Sunshine Coast Arts Foundation* in 2019, and the introduction of Council's arts levy in 2022 (through the *Arts and Heritage Levy*), have been major triumphs in the Arts Plan journey. They illustrate Council's commitment to further embed the arts into the Sunshine Coast way of life, and acknowledges its vital role as an economic and well-being generator. The levy generates a new funding pool for Council that has the potential to unlock a myriad of opportunities.

The region's arts profile is growing year on year. Council's channels have an engaged social media following of 25,000+, with almost 230,000 annual website views and over \$2 million in earned media coverage in FY 2021/22 alone. The establishment of the ArtsCoast brand will provide a platform to catalyse the creative landscape further and take the region's unique offering to the rest of Australia and the world. Arts Levy funding will enable the roll out of a brand and marketing strategy in 2023.

There have also been several advancements in Council's governance structures that will impact the refreshed Arts Plan. Notably, new funding mechanisms such as the Arts Levy and new structures and roles established, including the Horizon First Nations Advisory Group, First Nations Creative Development Officer and the Sunshine Coast Arts Advisory Board First Nations sub-committee that is currently being progressed, and new resourcing to strategically lead the development of the ArtsCoast brand.

Across the consultation, there was an optimism from the creative and private sector, with several future-focused ideas that could propel the Sunshine Coast arts sector to its next phase of maturity.

Commonly heard trends included:

- **Professional Development:** Professionalising the sector with connected capacity building programs
- **First Nations-led:** Ensuring the First Nations components of the plan are self-determined
- **Transformational Infrastructure:** The need for major draw card cultural infrastructure to attract new audiences, programming, and commercial opportunities
- **Audience development:** Understanding the needs of 21st Century arts audiences to attract and retain visitors
- **Profile and brand:** Solidifying the Sunshine Coast's unique creative brand proposition and ensuring it is reflective of place and culture
- **Partnerships:** Expanding funding opportunities and frameworks with more cross-sectoral collaboration.

Encouragingly, all these trends are reflected in the Arts Plan goals and actions, to some degree, with many trends straddling multiple areas. Given the advancements made since 2018, including notable increases in creative infrastructure and programming, there is a need to evolve some of the strategies to reflect this progress and set the roadmap for the region's next phase of growth.

Some of the new trends and ideas raised during consultation, that are not included in the current Arts Plan, are largely reflective of new developments and societal shifts that have occurred since the Arts Plan's inception.

They include:

- **Digital Engagement with the Arts:** Building digital literacy and adoption of new technologies
- **The Sunshine Coast Biosphere:** Capitalising on the Sunshine Coast's newly awarded biosphere status from UNESCO
- **Post-Covid recovery:** Building back sustainably post-pandemic by diversifying funding and embracing shifting ways of working and audience preferences
- **Brisbane 2032:** Leveraging the audience development and funding opportunities presented by the 2032 Olympics and Paralympics

As outlined in this report, it is recommended that the Arts Plan continues to deliver its goals, whilst refining some strategies to reflect the shifting priorities in the arts sector as it emerges from the pandemic, and responds to new opportunities that have arisen since 2018.

## 2. APPROACH

### 2.1 METHODOLOGY

This report has been compiled through extensive desktop research of local, regional, state, and national data (refer to Appendix F for reference list), along with critical insights gained through community and stakeholder consultation.

Council gathers a wide range of qualitative and quantitative information to measure its progress against KPI's articulated in the Arts Plan, and this data has also been used throughout this report.

In addition to this, the mapping of cultural infrastructure utilised Council and publicly available data sources.

A key data input was the council-led survey conducted in June 2022, that provided quantitative and qualitative insights of people's experience in the arts sector on the Sunshine Coast. This was supplemented by targeted consultation with key stakeholders who shape, influence, and have the potential to grow the creative arts sector on the Sunshine Coast.

Additional desktop research was undertaken from sources such as *Australian Bureau of Statistics (ABS)* and local education providers.

### 2.2 CONSULTATION PROCESS

The intent of the region's inaugural Arts Plan was to have the artist at its core, and accordingly, the review of the Plan's progress and its effectiveness, has been centred around consultation with the arts sector, so that their voice and needs are reflected in the refreshed Arts Plan. Council started consultation in early 2022 with focus groups conducted with the *Sunshine Coast Arts Advisory Board (SCAAB)* and the arts sector survey noted above.

In September 2022, *JOC Consulting* facilitated further stakeholder consultation. The purpose of the stakeholder consultation was to take a deep dive into the strengths, weaknesses, opportunities, and threats facing the Sunshine Coast creative arts sector, as well as identifying a shared vision and objectives for the next phase of the Arts Plan. This consultation phase also took the opportunity to broaden input to include the private business sector more generally, to uncover how to capitalise on potential partnership opportunities.

Consultation consisted of three 90-minute focus groups with key creative sector stakeholders and six one-on-one telephone interviews with private sector stakeholders.

### 2.3 CONSULTATION GOALS

- Identify the Sunshine Coast creative sector's unique attributes and strengths
- Understand how the Sunshine Coast creative arts sector has evolved since the Arts Plan was released in 2018

- Understand the current landscape and future opportunities for the Sunshine Coast's First Nations arts sector
- Identify barriers faced by artists, arts workers, and businesses on the Sunshine Coast
- Understand the Impacts of the COVID-19 pandemic on the local creative sector, prioritise the focus of recovery efforts and identify the opportunities it has presented
- Identify the private sectors aspirations, needs, and optimal ways of working when partnering with the creative sector
- Identify opportunities for artists, arts workers, and businesses to grow the Sunshine Coast's creative sector.
- Identify opportunities for private and creative sector partnership.

## 2.4 STRATEGIC CONTEXT AND THE ROLE OF COUNCIL

### A National Perspective

*Revive: Australia's cultural policy for the next five years* (The Australian Federal Government)

The timing of the Arts Plan refresh is strategically opportune given the release of the Federal Government's new *National Cultural Policy* in late January 2023. The intention of the policy is to *'change the trajectory of the creative sector, to deliver new momentum, so that Australia's artists and arts workers, organisations and audiences thrive and grow, and our arts, culture and heritage are re-positioned as central to Australia's future'*.

*Revive's* centrepiece is the establishment of Creative Australia, which will be the Government's new principle arts investment and advisory body. The governing body of Creative Australia will continue to be known as the Australia Council for the Arts, but the new structure seeks to expand on and modernise the organisation's work with additional funding of \$200 million over four years.

The policy also includes the establishment of four new bodies:

- *A new First Nations-led body that will give First Nations people autonomy over decisions and investments*
- *Music Australia, a dedicated new body to support and invest in the Australian contemporary music industry*
- *Writers Australia, to support writers and illustrators to create new works*
- *A new Centre for Arts and Entertainment Workplaces to ensure creative workers are paid fairly and have safe workplaces free from harassment and discrimination.*

*Revive* is structured around five interconnected pillars, which set out the Government's strategic objectives as follows:

1. *First Nations First: Recognising and respecting the crucial place of First Nations stories at the centre of Australia's arts and culture.*
2. *A Place for Every Story: Reflecting the breadth of our stories and the contribution of all Australians as the creators of culture.*
3. *Centrality of the Artist: Supporting the artist as worker and celebrating artists as creators.*
4. *Strong Cultural Infrastructure: Providing support across the spectrum of institutions which sustain our arts, culture and heritage.*
5. *Engaging the Audience: Making sure our stories connect with people at home and abroad.*

Ten principles also sit across the pillars to guide the government's actions and investments over the next five years. The establishment of Creative Australia seeks to restore funding decisions to the arts, ensuring they are made on the basis of artistic merit and 'at arm's length from Government and the Minister'.

Notably, *Revive* includes significant actions relating to pillar one: *First Nations First*, committing the government to a number of significant actions to support First Nations-led practice including ensuring decisions and investments are guided by First Nations people, protocols and principles and establishing frameworks, and partnerships to support the protection and preservation of First Nations knowledge and cultural expression.

Although the Sunshine Coast Arts Plan refresh will be deeply rooted in the experience and input from the local arts sector, there are many parallels between the key themes heard during consultation and Revive's five pillars. This presents a natural opportunity to align the refreshed Arts Plan goals, and the national Cultural Policy, and leverage this opportunity as the Federal Government puts focus on supporting and growing the arts sector as it emerges from the pandemic.

### First Nations Arts and Culture Strategy 2023-27 *(The Australia Council for the Arts)*

Another significant national document that provides a strategic framework for relevant actions in the Arts Plan refresh is the *First Nations Arts and Culture Strategy 2023-27*. The Strategy is led by the First Nations Arts and Culture Strategy Panel; a group of influential senior arts leaders who provide expert advice and help build strategic networks to ensure cultural continuity of Aboriginal and Torres Strait Islander arts and culture within a constantly changing environment.

The principles of the Strategy Panel are:

- *We are protocol driven – (aligned with the categories of the established and nationally significant protocol guide document, Australia Council for the Arts' Protocols for using First Nations Intellectual and Cultural Property in the Arts).*
- *We see arts as well-being: We value the contribution from all of community in the social and emotional well-being of our communities.*
- *We celebrate all arts: We support and celebrate First Nations achievement in the arts and cultural sector, in practice and endeavour, and in all its forms.*
- *We embrace cultural continuity: We embrace communities' continuation of culture through the arts, through its transformations, and development for time immemorial and forever more.*
- *We cherish arts as a human right: Cultural participation is a human right. We cherish arts and culture for its intrinsic value.*
- *We embody leadership: We remain grounded, while aspiring to strong strategic leadership.*
- *We collaborate: We foster dialogue between governments and the private sector, as well as an ever-increasing chorus of Aboriginal and Torres Strait Islander voices through capacity building.*
- *We respect governance: We act in accordance with the Council's governance policies and procedures.*
- *We demand Indigenous people's rights: We align with the UN Declaration of the Rights of Indigenous Peoples (2008).*

The Strategy outlines the Strategy Panel's objectives and principles along with a raft of inspiring case studies illustrating how First Nations artists, creative organisations and programs are shaping the Australian creative sector. As the Sunshine Coast Arts Plan moves to its next phase of maturity, there is an opportunity to use this strategy to underpin and inform directions and ambitions.

### Digital Cultural Strategy 2021-2024 *(The Australia Council for the Arts)*

The Australia Council for the Arts' *Digital Cultural Strategy 2021-2024* seeks to increase digital engagement with Australian arts and creativity, leading to greater community connection, well-being, and more dynamic and resilient cultural industries.



Image: *TheKeeper*, Kellie O'Dempsey | Photo: Cooper Brady Photography

This Strategy is focused around following eight priorities:

1. *Enable discoverability - Foster audience development to increase discoverability and access to Australian digital work.*
2. *Amplify digital practice - Enable risk taking and experimentation with digital and emerging technologies.*
3. *Fuel digital enabled business models - Support sustainable careers and dynamic business models and practice enabled by digital opportunities and platforms.*
4. *Build digital literacy - Increase literacy to embed digital within the arts and cultural industry.*
5. *Support First Nations digital development - Grow experiences of First Nations arts and culture through digital mediums (embedded priority).*
6. *Embed accessibility and inclusion - Support creative digital environments that are accessible, inclusive, and safe for all (embedded priority).*
7. *Build internal expertise - Build internal knowledge, expertise, and resources to lead by example and enhance the implementation of this strategy (enabling priority).*
8. *Activate digital partnerships - Activate partnerships across government and industries to maximise the benefits that digital offers the arts and cultural industry (enabling priority).*

As the Sunshine Coast arts sector moves into its next phase of maturity, and new digital programming opportunities become available, there is a need to evolve digital literacy and digital practice, the *Digital Cultural Strategy 2021-2024* provides a robust framework with which to align.

## A State Perspective

### Creative Together 2020 - 2030

*Creative Together 2020-2030* is supported by three consecutive action plans, categorised as *Sustain (2020-2026)*, *Grow (2022-2026)*, and *Thrive (2026-2030)*. The strategy evolves in maturity to 2030 and beyond to the development and delivery of the Brisbane 2032 Cultural Olympiad and includes strategies for legacy outcomes. The key priority areas of the 10-year roadmap are:

- *Embrace Brisbane 2032 across Queensland*
- *Elevate First Nations arts*
- *Activate Queensland's places and spaces*
- *Drive social change and strengthen communities*
- *Share our stories and celebrate our storytellers.*

The *Grow* action plan will provide a valuable overlay for the refreshed Arts Plan, with strong synergy between its focus areas and the Arts Plan goals. Key focus areas include elevating the State's experience economy and international reputation through high-quality arts experiences, particularly unique First Nations experiences, and products specifically in response to Brisbane 2032.

Additionally, there is a strong focus on nurturing the State's pipeline of arts workers and supporting collaborations or partnerships to grow investment in the sector, boost audience development, and extend market reach. The State Government's commitment to building a prosperous and sustainable arts sector through *Creative Together 2020 - 2030*, provides a supportive policy environment for the Arts Plan to operate within.

### Towards Tourism 2032

*Towards Tourism 2032: Transforming Queensland's Visitor Economy Future* is the State Government's collective framework to set the direction of tourism in Queensland for the next 10 years. It is supported by a series of implementation plans categorised as *Build and Focus (2023-2025)*; *Evolve and Transform (2026-2029)* and *Accelerate and Shine (2029-2032)*.

The vision is for Queensland to be Australia's destination of choice for domestic and global visitors seeking the world's best experiences by 2032.

The key strategic themes of the 10-year framework are:

- **Demand:** Deliver a global marketing strategy, the Queensland Music Trails program, and develop a new business events industry strategy.
- **Supply:** Deliver tourism product/experience grant programs, targeted accessibility initiatives, and leverage the new State Fossil Emblem.
- **Connectivity:** Develop a new drive tourism strategy, deliver the aviation attraction funding boost, and support regional connectivity and accessibility.
- **Sustainability:** Develop a pathway to net zero, support destination eco-certification, and develop an ecotourism plan for protected areas.
- **Brisbane 2032:** Drive global awareness of the Queensland brand and embed tourism in the Brisbane 2032 Legacy Strategy and Plan.
- **First Nations:** Develop an Indigenous Tourism Development Roadmap, extend the Our Country Advisory Service, and enhance industry partnerships.
- **Investment and funding:** A one-stop concierge service for investors, examine approval pathways for tourism, and advocate for insurance affordability.
- **Talent and skills:** Leverage the Queensland Workforce Strategy, deliver targeted business capability and advocate for visa streamlining.
- **New ways of working:** Investigate a tourism knowledge hub, support technology uptake, and enhance service delivery across the tourism network.

The 10-year plan is complementary to the *Creative Together 2020–2030* roadmap, with actions aligned to developing creative arts and cultural tourism experiences and events. The Build and Focus implementation plan for 2023-2025 will be a valuable overlay for the refreshed Arts as it sets actions to grow industry now, and lay foundations for future growth.

Authentic culture is identified as one of the '10 tourism game changers' for Queensland and it also seeks to establish Queensland as Australia's leading destination for Indigenous arts and cultural events through a greater investment in events.



Image: *Crystal Ball Dawn*, 2018 Environment and Liveability Photography Award Finalist (Junior Category) | Alex Roper

## A Regional Perspective

The *Sunshine Coast Destination Tourism Plan* developed by the region's peak tourism body, Visit Sunshine Coast (VSC), identifies several opportunities and goals around developing arts and cultural experiences, noting this as a tourism 'product gap' in the region.

VSC's mission is to lead the tourism industry in promoting the Sunshine Coast's experiences and build a sustainable sector that will maximise the long-term benefits of the visitor economy to the region.

Increasing arts and culture tourism, and the development of arts & culture product (and Indigenous experiences), is a key strategic consideration of the plan with the aim of attracting niche, high-yielding visitor markets that are seeking authentic and immersive experiences.

Council works closely with VSC to leverage marketing and promotional benefits for the region with supported creative events and experiences. As the region's arts and culture sector experiences and infrastructure evolve, and the ArtsCoast brand expands, there is an opportunity to strengthen this relationship and work collaboratively towards VSC's target to increase in Arts & Cultural tourism (including Indigenous tourism) from \$1 million in 2019, to \$1.3 million in 2025.

## A Local Perspective

The Arts Plan complements a suite of Council endorsed strategies, plans and policies that aim to nurture the development of the interrelated aspects of culture, creativity, and the arts. These strategic documents seek to contribute to the vision of the Sunshine Coast Council's *Corporate Plan 2022-2026* to be: *Australia's most sustainable region. Healthy. Smart. Creative.*

Through the vision and goals of the Arts Plan, Council aims to amplify the voice, visibility, development, and recognition of the arts sector. To achieve this, council will take on a range of roles (as appropriate), including facilitator, advocate, partner, provider, asset owner, investor, information and service provider and creative leader. It must be acknowledged that Council cannot single-handedly be responsible for the growth and prosperity of the local arts sector, but rather it is a partnership between Council, the local arts sector, artists and businesses, the private sector, and the broader community.

## 2.5 DEFINITIONS

It is important to understand the definition of 'the arts' used in the Arts Plan, and thus the genres and sub industries it seeks to support, and the areas of focus for this audit report.

The definition used by UNESCO and the Australia Council for the Arts is the basis for outlining the scope of the Arts Plan. The Arts Plan therefore defines the arts, and by extension, artists, and workers within the arts industry, to include:

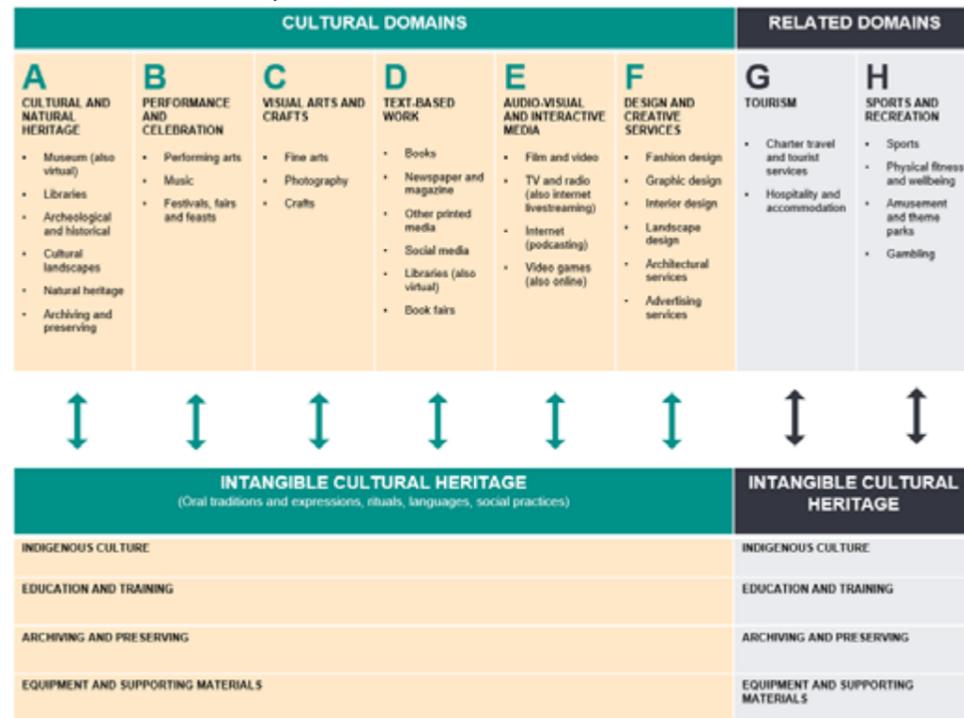
- literature
- music, in all forms
- theatre, musical theatre and opera
- dance, in all forms
- other performing arts such as circus, comedy and puppetry
- arts festivals
- visual arts and crafts
- screen - film, television and online
- arts education and training
- Aboriginal and Torres Strait Islander arts
- community arts and cultural development
- emerging and experimental arts.

To focus programming and investment, and to minimise duplication (where areas are addressed in other council planning documents), the Arts Plan does not include:

- other broadcasting activities, the print media, multi-media without an arts content focus
- cultural institutions such as libraries, museum, and archives
- broader areas of cultural activity such as environmental heritage
- broader areas of creative activity such as fashion, design, or architecture.

Some of the mechanisms that artists may use to showcase and present their work can include events, festivals, public spaces, theatres/performance venues, libraries, online platforms, retail outlets and media (online, television and radio). Digital and new technologies are recognised as tools for artists and the sector to create, showcase and integrate art into all strategic goal areas. These definitions help to provide scope for the Arts Plan and in turn this audit report.

Broadly, the UNESCO Framework for Cultural Statistics provides a framework for cultural and transversal domains. An overview of these categories and related domains is provided below, notwithstanding the previously listed industry exclusions of this Arts Plan (adapted from UNESCO Framework for Cultural Statistics).<sup>3</sup>



## 2.6 LIMITATIONS

It is important to note the limitations and age of some of the data used to compile this report, notably that some research such as the most recent comprehensive national snapshot (*Creating Our Future: Results of the National Arts Participation Survey*, by the Australia Council for the Arts) that provides a benchmark of Australians' arts engagement, is from late 2019, prior to the COVID-19 pandemic and many other socio-economic shifts that have impacted the arts sector, globally and within Australia.

The last local audience research (Sunshine Coast Audience and Market Research conducted by Pattern Makers) was conducted in 2020, prior to our understanding of the fall-out of the COVID-19 pandemic, so we must acknowledge that audience behaviours and attitude may have shifted during this time of great upheaval. Although some of these audience insights have been referenced in this audit report, it is important to note that Council is currently commissioning an audience development strategy, which will analyse more current data. These new post-pandemic audience insights will help to inform the next iteration of the Arts Plan.

There are also limitations to ABS data related to the definition of those employed in the arts, and how creative industry groupings have changed over the years. It is important to note, that different reports may have selected different categories and subcategories to make up the definition of people employed in or studying the creative arts. This makes comparison of data inaccurate, unless the same classifications are being compared as like for like.

Lastly, it is not guaranteed that survey participants were the same across the Sunshine Coast Arts Sector surveys from 2017 to 2022, so we cannot provide a direct comparison of the sector responses, but merely an indication of industry trends.

## 3. AUDIT

### 3.1 A GROWING APPRECIATION OF THE ARTS

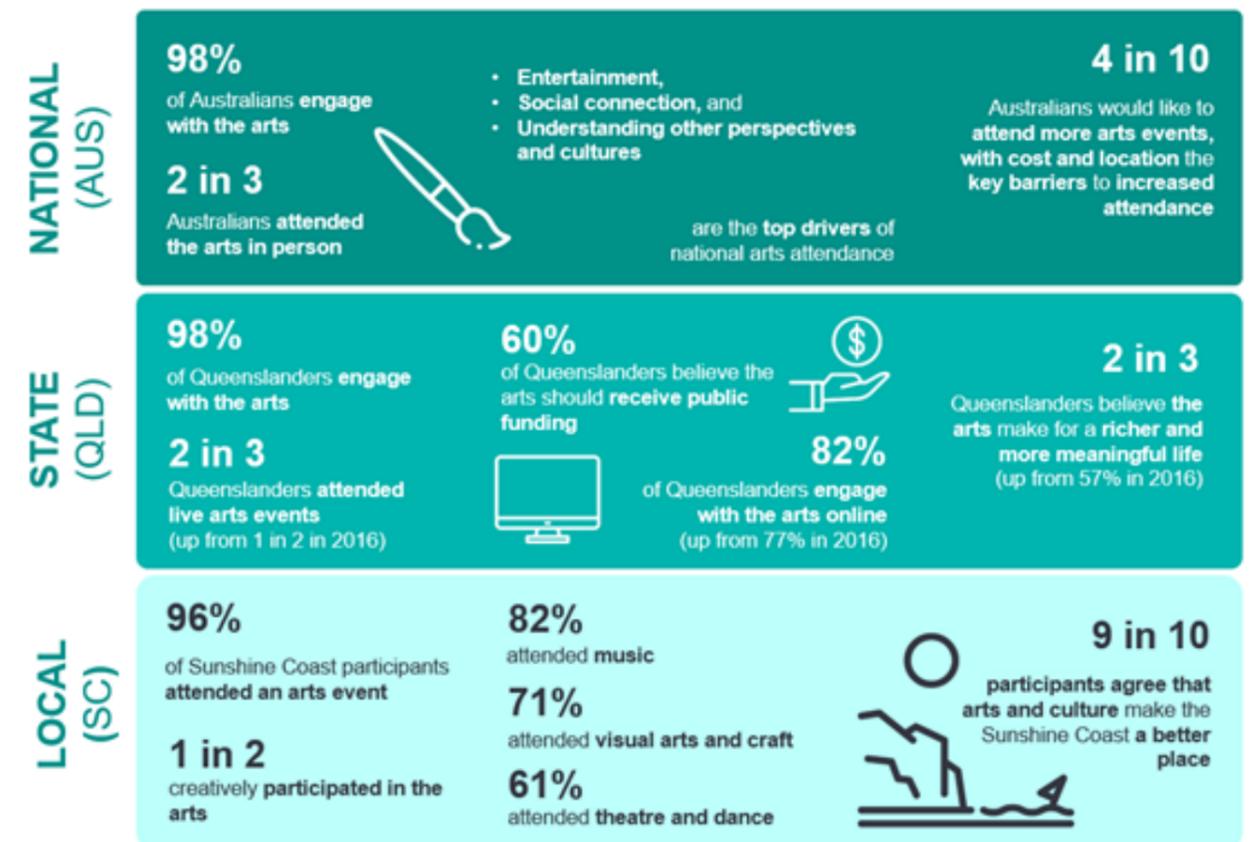
In 2020, the Australia Council of the Arts released *Creating Our Future: Results of the National Arts Participation Survey* - the fourth study in the landmark research series that explores Australians' engagement with and attitudes towards the arts. The survey provides the most recent major benchmark of Australians' arts engagement before the impacts of the pandemic.

Encouragingly, the national findings showed a growing appreciation of, and participation in the arts, with 84% of Australians acknowledging the range of positive impacts it has on our lives, communities, and our national identity (up from 75% in 2016).<sup>4</sup>

Throughout 2020 and 2021, The Australia Council of the Arts invested in a multi-year Audience Outlook Monitor tracking study which provided the arts and cultural sector with crucial insights to inform planning and decision-making. The Audience Outlook Monitor will continue to provide 'pulse checks' of arts audience behaviour throughout 2022, as the pandemic enters a new phase.

In 2020, Council commissioned market research to understand and develop audiences in the region. The below provides a snapshot of some of the key national, state, and local findings of these studies.

Sources: The Australia Council of the Arts, *National Arts Participation Survey, 2020*; Australia Council for the Arts, *National Arts Participation Survey – Queensland Highlights, 2020*; Sunshine Coast Council & Patternmakers, *Audience Market Research, 2020*.



### 3.2 THE ARTS PLAN JOURNEY SO FAR

This report has recorded the momentum of the Sunshine Coast's creative journey, and the successful structures, partnerships, initiatives, and landmark events that comprise the arts sector on the Sunshine Coast.

The following time-line highlights the key milestones over the past seven years, including those which directly contribute to the development of this report, and will help to inform the subsequent refresh of the Arts Plan.

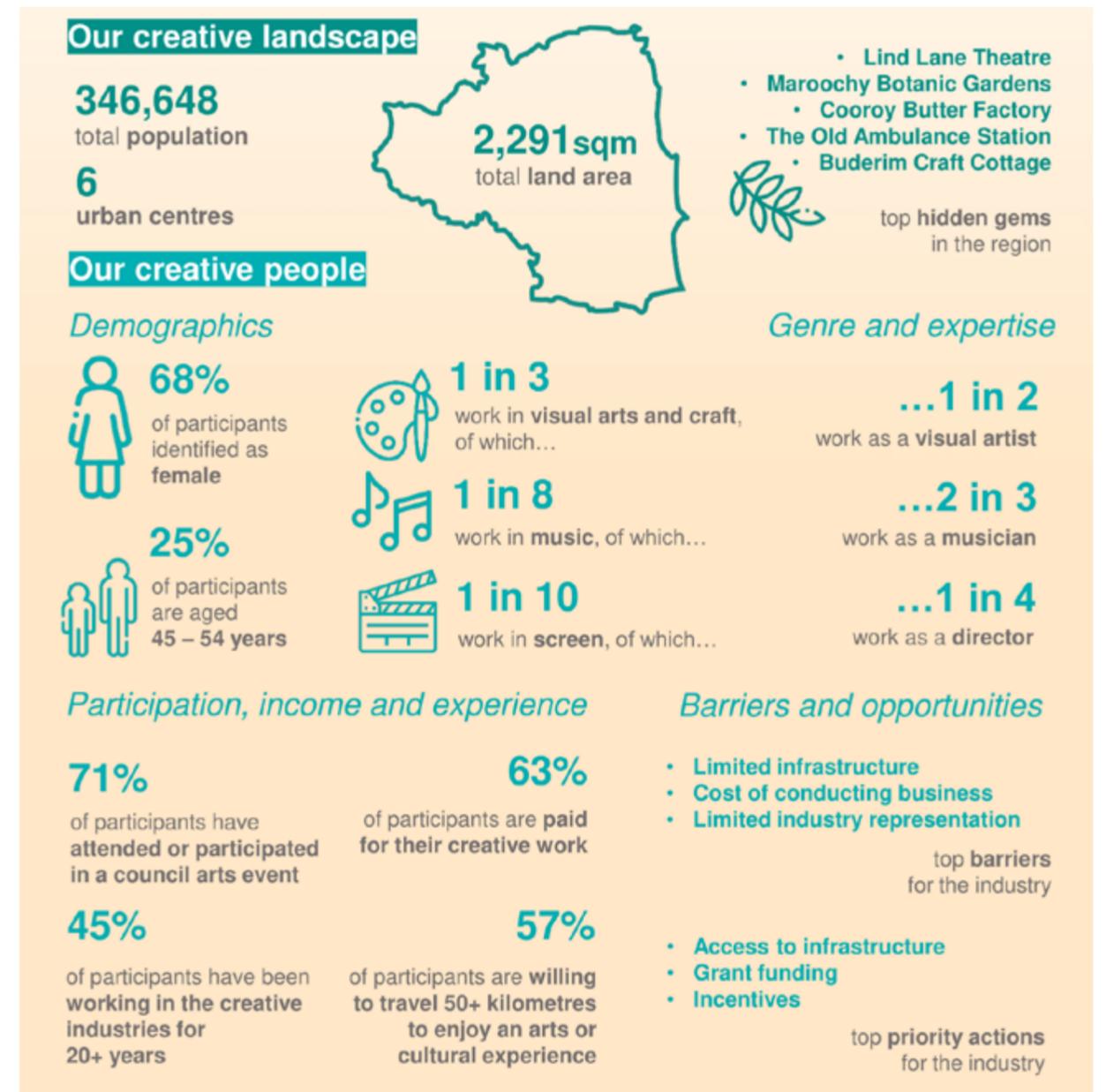


### 3.3 THE ARTSCOAST AT A GLANCE

The Sunshine Coast is home to many creative people who enjoy what the region's inspiring landscape has to offer. Council is in the early stages of rolling out a regional brand identity - 'ArtsCoast' which seeks to encapsulate and promote the essence of what makes the Sunshine Coast a unique creative destination to live, work, and visit.

The following infographic summarises key insights from the 2022 Arts Sector Survey, which gathered input from 537 participants. At a high level, these findings highlight several strengths of the region, including:

- Ongoing engagement with and commitment to the arts, with participants expressing long-term involvement in creative industries and willingness to travel great distances for arts-based experiences.
- High level of leadership and number of practising artists, with many participants working as visual artists, musicians, or directors.
- Growing professionalism with an increasing number of participants being paid for their creative work and many deriving their entire income from it.



### 3.4 OUR WORKERS

According to the ABS, in 2020/21, 37,606 people in Queensland were employed in Arts and Recreation Services.<sup>4</sup> Within those services, 6,459 were employed in the Creative and Performing Arts Activities sector. Of these, 2,703 people were employed on the Sunshine Coast (up from 2,338 in 2019/20).

Within those services, 483 were employed in the Creative and Performing Arts Activities sector (up by an additional 86 people from 397 in 2019/20). **This comprises 2% of the Sunshine Coast's full-time industry; a figure 0.5% higher than the state of Queensland (1.5%).<sup>5</sup>**

Full-time employment in the arts (Arts and Recreational Services) in the region is steadily increasing, at a growth rate of 0.1% per annum.

#### 2022 Sunshine Coast Creative Arts Sector Survey

The 2022 Creative Arts Sector Survey indicates that the Coast's arts practitioners represent a broad scale of professionalism and ability to generate income from their arts practice, with 39% saying that 100% of their gross annual income is from their arts practice, work, or business; 21% saying they only generate 10% of their income from their practice and the remainder of participants sitting somewhere in the middle.

Further, 59% of participants identified as a practising professional artist or arts worker, while 17% identified as a hobbyist.

#### Working patterns

Positively, the number of full-time arts practitioners has increased since the previous survey in 2017:

- Full time workers: 42% (up from 31% in 2017)
- Part-time workers: 25% (down from 32% in 2017)
- Casual workers: 25%
- Working in the arts for more than 20 years: 45%.

#### Volunteers

The sector continues to attract strong volunteer support from a dedicated network of supporters who donate a significant amount of time. Although the amount of people volunteering in the arts is slightly down since the 2017 survey, the number of volunteers doing 20-50 hours per month has increased. This is anticipated to be a COVID-19 impact.

- Volunteers: 8% (down from 13% in 2017)
- Volunteers for more than 10 years: 39%
- Volunteers doing 20-50 hours/month: 27% (up from 18% in 2017).

#### Income generated from the arts

Survey data indicates that more people in the sector are able to generate income from their creative work compared to 2017. More sector respondents said they were paid for their work and the amount of people earning more than \$91,000 annual gross income from their practice, work or business, was up significantly from only 3% of survey participants in 2017 to 13% in 2022.

- Paid for their work: 61% (up from 55% 2017)
- Work for free: 18%
- Income from arts: < \$16,000 38%
- Income from arts: > \$91,000 13% (up from 3% in 2017).

The 2022 survey looked closer at creative workers with a question asking for specific roles within music, visual arts, textiles etc. whereas the 2017 survey asked for broader disciplines / genres. A breakdown of this can be found in Appendix A. This deeper understanding of the varied roles that make up the Sunshine Coast's creative ecology, can be used to tailor professional development and support programs as well as providing longitudinal data of shifting employment patterns if this level of detail is captured in future sector surveys.

### Location

The most recent national arts participation research shows that creativity is strong in the regions, residents of regional Australia are as likely to creatively participate in the arts as residents of metropolitan Australia, and that living in a regional area does not substantially affect overall arts attendance.<sup>6</sup>

Despite high levels of arts participation and appreciation in the regions, 42% of regional artists believed that their location had a more negative than positive impact on their practice, and on average, they earn almost a third less than their city counterparts for creative work.<sup>7</sup>

The Sunshine Coast Region local government area is a large and geographically dispersed region, from popular tourist beaches to hinterland, country towns and farmland. Often called a 'community of communities and described by one Council focus group participant as '45 communities spread across the size of a small country', accordingly most of the arts infrastructure is very distributed.

#### 2022 Sunshine Coast Creative Arts Sector Survey

57% of 2022 arts sector survey participants are willing to travel 50+ kilometres to enjoy an arts or cultural experience. Interestingly, the distance between the furthest two most popular destinations noted as 'hidden gems', Cooroy Butter Factory & Maroochy Botanic Gardens is 49km.

The locations with the highest concentration of artists residing in them are [Maroochydoore](#), [Caloundra](#), [Nambour](#) and [Buderim](#).

Nambour scores highly as a creative location appearing in the 2022 survey as a not only a popular destination to live for artists, but the town, and many of its venues and events, were frequently noted as a 'best value hidden gem' within the coast's creative landscape.

According to 2019 research into Queensland's cultural hotspots by *Queensland University of Technology*, the region's creative industries are concentrated along the three north-south strips with the following areas attracting larger clusters of certain industries.<sup>8</sup>

- Maroochydoore CBD and the coastal strip: advertising, marketing, and film, TV, and radio industries
- Hinterland: visual and performing arts
- Eumundi/Yandina area: publishing
- Those working in the cultural production industries are more likely to be located away from the coast.

### Top genres

Visual arts: 34%

Music: 15%

Screen: (film, TV, video) 10%

Festivals and Events: 8%

*Top genres from the 2022 SC Creative Arts Sector Survey*



Image: The Old Lock Up, Maroochydoore

### 3.5 TRAINING AND EDUCATION

In 2021, 62,421 students were undertaking a course related to the creative industries at Australian higher education and TAFE in Queensland. Within that, 3,762 were studying on the Sunshine Coast.<sup>9</sup>

Educational attainment for people working in the arts is relatively high, with 38% of people working within the Arts and recreation services in 2021, holding a bachelor's degree or higher.<sup>10</sup>

This is also reflected on the Sunshine Coast, with 56% of 2022 Creative Arts Sector Survey respondents holding a bachelor's degree or higher, and an additional 30% holding a Certificate or Diploma.

#### Arts education on the Coast

**University of Sunshine Coast (UniSC)** offers 15 programs including bachelor's degrees in arts, Design and Creative Industries.

In 2023, UniSC is offering a Bachelor of Music for the first time to develop the scope and skills of the next generation of music industry artists and professionals.

**TAFE Queensland East Coast** offers 9 programs, including Diploma of Visual Arts, Diploma of Screen and Media - Animation, Gaming and Visual effects, Diploma of Photography and Digital Imaging and Certificate qualifications in fashion, screen, and visual arts. This is a reduction from 14 creative programs on offer in 2017.

#### 2022 Sunshine Coast Creative Arts Sector Survey

The vast majority (70%) of 2022 Arts Sector survey participants had participated in a council arts event e.g., Horizon, Refinery, Gallery exhibition or program.

#### Council-run professional development

Council offers a wide-ranging program of professional development and training opportunities for the local creative sector and continues to partner and provide industry advice and support to multiple arts organisations.

Stand-out programs include:

- **The Refinery - delivered in partnership with The Met, Maroochydore and the Sunshine Coast Creative Alliance (the region's peak industry body).** It is a 15-week creative incubator program designed to transform ideas into sustainable businesses. *The Refinery* culminates in a public showcase to launch participants' businesses. Since its inception in 2019, *The Refinery* has supported over 60 creative entrepreneurs and shared their stories with millions through social media, and over 1,000 people through industry events. *The Refinery* was voted as the most impactful Arts Plan initiative by arts sector workshop participants.
- **Project 24** is an ArtsCoast Space for Creative residency program housed at 2nd Space, Nambour which offers 24 month-long artist-in-residence opportunities over a 12-month period. This program includes one-on-one and group sessions with respected local and national mentors.
- **Unwritten Models** took six local arts organisations through six-months tailored mentorship lead by Liz Burcham, an experienced arts leader, along with invited speakers from Creative Partnerships Australia and the Museum of Brisbane.
- **The Old Ambo Takeovers Project** offers rent free gallery and theatre space to develop new works and attract new audiences, as well as \$2000 to successful applicants. A number of successful takeovers have occurred, featuring 19 artists presenting to an audience of almost 400 people.
- **Footfall** facilitated by Courtney Scheu, provided eight selected pre-professional and emerging dance artists, an opportunity to invest in their practice, connect with local artists and build a toolbox for sustaining practice in the independent arts sector.

Since the Arts Plan was established in 2018, Council has delivered 733 training development opportunities to 8,310 artists

- **DANCE.HERE.NOW.** This three-year dance development initiative has a focus on increasing participation, professional practice, programming, networks, and spaces for dance through partnerships, collaboration, and new approaches. In its second year, the program supported 27 dance development initiatives for 165 dance sector participants.
- **Fabric** This program highlighted the region's values in sustainability, and celebrated the unique local textile industry and artisans on the Sunshine Coast. Over the three years the program ran, it delivered 126 events and activities including exhibitions, forums, bespoke master-classes and professional development, and attracted more than 3044 people, engaged 30 partnerships, and reached audiences of over 18,900 people.
- **The Path** was a three-month intensive program for emerging contemporary artists assisting them to prepare, strategize and design a professional path towards future projects, and proposal delivery for exhibition or presentation of their work for the arts industry. The program had 11 participants and engaged six external mentors.
- **DISRUPT** Consisted of a six-week series of workshops and collaborations for artists of any discipline, aimed to amplify the essence of why they make, while dabbling awkwardly in the unknown. The program had six participants, engaged four external mentors across four creative spaces, and has seeded new works in development for artists involved.

### 3.6 VENUES AND FACILITIES

It is difficult to quantify the number of arts spaces and facilities on the Sunshine Coast as the arts happen in a range of formal and informal spaces, creating temporary and permanent experiences (for example live music can be performed in pubs and public spaces and visual arts exhibitions can be displayed in retail spaces and cafés).

For this report, community and privately owned spaces have been reviewed:

- 67 Community venues (up from 65 in 2017)
- 72 Cultural facilities (up from 21 in 2017) (note this increase may be due to a more comprehensive audit conducted in 2021)

Council's community group directory listed [168 entries under arts and creativity](#) (down from 189 entries in 2017).

**Caloundra Regional Gallery** is a major asset and continues to fulfil its core function of exhibiting, promoting, and educating the community through visual culture, including the celebration of art and artists of the region. The 2020 audience research indicated that community awareness of this venue was high, with the majority (65%) of participants having heard of this venue.

This financial year, exhibition visitor numbers have increased by 21% (15,096 in FY 21/22 vs. 12,421 in FY20/21) compared to the previous year, and program attendees have jumped by 60% (5,399 in FY 21/22 vs. 3,381 in FY 20/21), showing the communities strong engagement with the gallery as we emerge from the pandemic.

**Since 2019 the gallery has:**

- Attracted 39,759 in gallery visitors
- Attracted 67,755 digital program attendees
- Featured 426 local artists
- Hosted 39 exhibitions
- Hosted 175 digital programs
- Hosted 24 training programs
- Grown social media followers YoY
- Generated \$1,256,063 worth of earned media value.

In addition to the more established and conventional cultural venues such as the Caloundra Regional Gallery and the Caloundra Events Centre, the Sunshine Coast has a growing collection of experimental and unexpected spaces where multi-disciplinary arts can thrive and be discovered including:

- **The Old Ambulance Station** in Nambour is the Coast's only multi-arts facility housing two galleries and a purpose-built black box theatre, dedicated meeting spaces, and several creative studios.
- **The Arts & Ecology Centre at the Maroochy Bushland Botanical Garden**, is a specialised arts and ecology interpretative centre. The centre offers a variety of activities such as exhibitions, artist in residencies, educational events and informative displays that connect directly with nature to enable a better understanding of the environment, and the importance of biodiversity.
- **Maroochy Art Space** at Cotton Tree Library, is a space for emerging artists to work with the Regional Gallery in curating and developing an exhibition of their work.

The following spaces are supported through the *ArtsCoast: Spaces for Creatives* program, that seeks to activate a network of spaces across the region:

- **Sub Tropic Studio** (a partnership with *Sunshine Coast Creative Alliance*) in Caloundra is home to a lightbox gallery, artists' studios, and a workshop space for hire. All located in a subterranean bus station designed as a testing ground for contemporary, experimental art and design.
- **The Old Lock Up** is a multi-disciplinary arts space in Maroochydore, for artists to explore experimental, collaborative, and diverse approaches to making art, sharing art, and talking about art.
- **2nd Space** in Nambour, is a space for artists and creatives to connect, collaborate and cause commotion. It offers professional and sector development programs and networking activities, plus dedicated creative co-working studio for early-stage creative businesses.

### 2022 Sunshine Coast Creative Arts Sector Survey

Arts Sector participants deemed the following channels most effective to promote arts products, services, programs, or businesses (with 1 being not effective and 10 being highly effective):

- |                                   |                                    |
|-----------------------------------|------------------------------------|
| • Social media (7/10)             | • Showcases and exhibitions (5/10) |
| • Networking opportunities (7/10) | • Media and publicity (5/10)       |

## 3.7 THE ARTSCOAST'S HERO EXPERIENCES

It is important to recognise that the sector is delivering numerous hero experiences and festivals, independently of Council, that adds to the Sunshine Coast's thriving arts ecology. This report will detail the major Council-led initiatives and their key metrics of success.

### Horizon Festival

First presented in 2016, Horizon Festival is the Sunshine Coast's signature arts and cultural event. Over 10-days and nights, the festival presents music, visual art, performance, dance, family entertainment, spoken word, comedy, and workshops across the region in multiple locations. The annual arts and cultural program celebrates place, encourages community participation, provides capacity building opportunities for the local arts sector, and generates economic benefit for the Sunshine Coast region.

**Since its inception in 2016, the festival has:**

- Attracted 193,068 physical attendees
- Delivered 340+ unique events
- Provided 1000 + local artist engagements
- Facilitated 65 + internal and external partnerships
- Provided 700+ First Nations artist engagements

- Created 42 training opportunities (or trained and instructed 158 artists)
- Generated a year on year growing social media following
- Achieved \$2,657,808 worth of earned media value
- Delivered an economic impact (direct visitor spend) of over \$3 million to the region
- Generated a total spend in the region of over \$8 million.

### Sunshine Coast Art Prize (SCAP)

Since 2006, the annual Prize has showcased the work of the nation's outstanding contemporary artists. The flagship award has an annual prize pool of over \$35,000. Since 2019 the Prize has:

- Received 1500+ entrants
- Attracted over 13,000 visitors to the SCAP exhibition.

## 3.8 ARTS PROFILE AND MARKETING

In line with the development of new arts programming and experiences, the Sunshine Coast Council has established a number of digital properties including websites and social media profiles.

The Creative Arts and Events team, across a range of arts platforms, manages an extensive, year-round marketing and communications program to promote initiatives, and develop and engage new and existing audiences.

As of FY 2021/22, Council's three major arts platforms have the following profile:

### Caloundra Regional Gallery | Horizon Festival | ArtsCoast

- 25,000 + social media followers
- Almost 230,000 annual website views
- 20,000+ e Newsletter subscribers.

Cumulatively, they achieved significant media coverage in FY 2021/22:

- 587 media placements
- 9,389,175 audience reach
- \$2,134,829 earned media value.

The following council-supported venues also have their own websites and social media profiles that are managed by the independent artists running the spaces:

- [The Old Ambulance Station](#)
- [Sub Tropic Studio](#)
- [The Old Lock Up](#)
- [2nd Space](#)



Image: Sub Tropic Studio | Photo: Madison and Coau

### 3.9 FUNDING

Through Arts Queensland, the Queensland Government provides a number of funding programs to the arts sector including Queensland Arts Showcase Program (QASP), Touring Fund Queensland, Regional Arts Development Fund (RADF), First Nations Art, Craft and Design: Transforming Marketplaces program, and the Indigenous Arts Development Fund (IRADF).

In September 2021, the Queensland Government committed \$33.5 million over four years in core funding to a record breaking 46 Queensland arts and cultural organisations through the *Organisations Fund*. This funding is a key move in delivering on the Vision of *Creative Together 2020-2030*, the Government's 10-year roadmap to renew and transform Queensland through arts, culture, and creativity.<sup>11</sup> It is worth noting, that no Sunshine Coast organisations were funded through this initiative.

Arts Queensland also implemented a number of measures and new funding opportunities to support the arts sector in the wake of the COVID-19 pandemic, and the negative impact it has had on the sector. In June 2022, the Queensland Government announced a \$22.5 million, two-year, Arts and Cultural Recovery Package for Queensland's arts and cultural sector.<sup>12</sup>

Arts Sector Focus Group Participants flagged the funding gap that will be left when COVID-19 'emergency' arts funding 'dries up'. They indicated that there is a need for longer-term state and federal government funding initiatives, that focus on long-term capacity development and audience development, and that this will build a more resilient and prosperous sector, that can respond better to future shocks and stresses.

The need to explore and encourage alternative funding models such as private sector collaboration and social enterprises, to take the place of missing state funding, was also raised during consultation.

#### On the Sunshine Coast

From FY 2019/20 to FY 2021/22, Sunshine Coast artists received a total of \$1,486,264 across 293 arts-based projects, distributed by Council.

Funding sources included:

- Regional Arts Development Fund (RADF) – a partnership with Arts Queensland
- Community Partnership Funding Program (CPFP)
- Councillor Discretionary Funding
- Community Grants Program
- Creative Industries Investment Program (CIIP). (NB: this will be distributed in FY 22/23 for the first time).

#### 2022 Sunshine Coast Creative Arts Sector Survey

45% of respondents had applied for grants or funding (up from 38% in 2016).

Unlike the 2017 survey, the 2022 survey asked for the percentage success rate for grant applications, but findings varied quite significantly, from 19% having a 100% success rate, 15% having a 50% success rate and 13% saying that had a 0% success rate.

#### The Arts Levy

The introduction, in 2022, of the Arts and Heritage Levy, at \$3 per rateable property for the arts component, is a major development in arts funding on the Sunshine Coast and will be used to achieve the four key Arts Plan goals, specifically those related to programming, funding support and audience development.

#### The Sunshine Coast Arts Foundation (SCAF)

The Sunshine Coast Arts Foundation (SCAF) was established to develop philanthropic investment in the arts, provide funding opportunities to support the growth of audiences and to support artists in line with the Sunshine Coast Arts Plan. Core objectives relate to the stewarding, servicing, and accepting donations, gifts, bequests, endowments, trusts, and other forms of financial contribution and promoting and advocating for a culture of giving and philanthropy in the region.

In 2020/21, the Foundation received \$125,000 in contributions from 26 donors. Recipients of grants from the Foundation included The Glasshouse Project, Sunshine Coast Chamber Music Festival and Australian Wearable Art Festival.<sup>13</sup>

### 3.10 THE EFFECT OF COVID-19 ON THE ARTS SECTOR

The arts sector was one of the worst hit by the COVID-19 pandemic and the resulting public health measures. In 2020, ABS revealed only 47% of Arts and Recreation Services businesses were still trading. They identified the arts as the worst-hit industry, while 90% continued to trade in the majority of other sectors.<sup>14</sup> In the same year, the Grattan Institute projected a 75% employment downturn for the arts sector.<sup>15</sup>

Whilst the pandemic drastically shifted working patterns of the arts sector, and created an impetus to explore new ways of practice and delivery, audiences also developed a new-found appreciation and need for the arts, with **73% of Australians turning to the arts to improve their mood and quality of life during the pandemic.**

#### 2022 Arts Sector Survey Insights

Survey participants were asked 'How has Covid impacted your industry?' The top three responses were:

- Loss of income 60%
- Limited opportunities 47%
- Loss of local audiences 36%

#### 2022 Arts Sector Focus Group Insights

This was reinforced by arts sector focus group participants when asked 'How has the COVID-19 pandemic affected the way you work? What recovery efforts should be prioritised?'

Key responses included:

- **The need for long term government funding** to focus on professional development, that helps to establish more resilient and sustainable business models for artists/ arts businesses.
- For some arts workers, the pandemic allowed them to engage with new, and often more diverse, online audiences but there is a **need to build digital capacity** to leverage and develop digital platforms, content, audiences, and experiences.
- **A concern about the loss of local audiences**, as people have become accustomed to entertaining themselves at home rather than attending live events.
- **The need to focus on audience development** and understanding what people want post-pandemic will be key to recovery.
- The shift to online conferences and events **opened up networking opportunities with global leaders in the sector**, as distance no longer became a barrier to participation. As these events move back to in-person, there is a need to explore how the Sunshine Coast can attract arts leaders and conferences, and/or explore paths and partnerships to provide local artists access to key development events.

The Arts Plan was adopted back in 2018, and following three years of consistent outcomes delivery, the seismic shifts created by the pandemic meant pivoting approaches and delivery modes. It also meant reviewing and re-establishing priorities to ensure the roll out of the 20-year arts plan stayed on track in this new environment.

Despite significant disruptions to creative programming and the disappointing cancellation of the Horizon Festival due to a hard lock-down in 2021, the Sunshine Coast Arts Advisory Board (SCAAB) Annual Report 2021/22, paints a hopeful picture of a sector getting back on its feet and embracing new ways to create, collaborate and connect in a 'COVID normal' world.

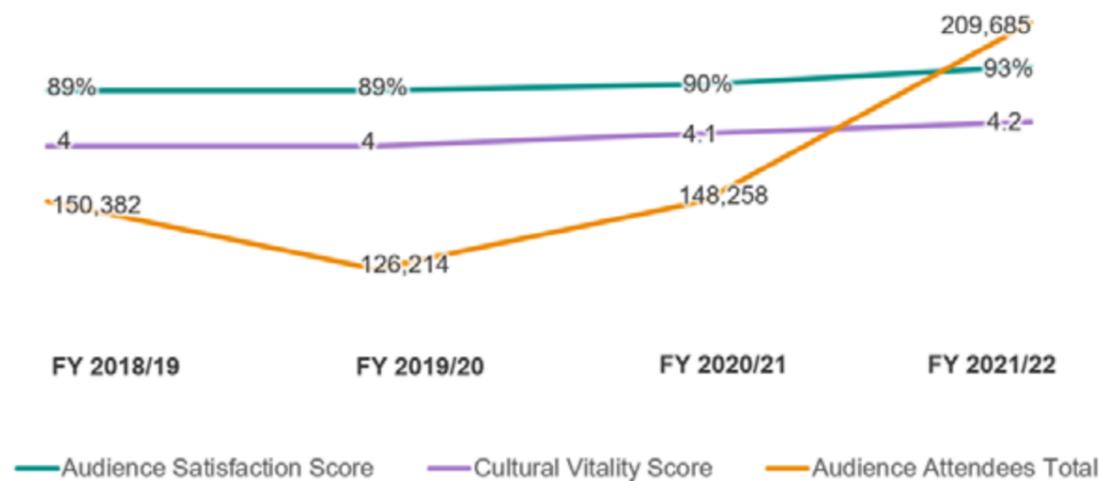
### Shifts to local arts programming that resulted from COVID-19 included:

- Entry fees waived for the Sunshine Coast Arts Prize in 2020.
- Horizon Festival 2020 moved online and was restructured to a three-month rolling program from June to August. It saw online attendance of 100,557 and high satisfaction rates.
- Horizon re imagined in 2021, saw an online audience of 3,628. Although the full festival was cancelled, 14 events were delivered, attracting 8,523 physical attendees which engaged 266 local artists. Where possible, commitments were made to roll-over contracts to the 2022 festival.
- The Caloundra Regional Art Gallery developed new online programming, which attracted an online audience of almost 45,000, 140,000 website visitors and thousands of new social media followers.
- The Sunshine Coast Art Prize winner announcement was live streamed for the first time ever, and attracted an online audience of 3,500.
- COVID-19 restrictions also required re-imagined delivery models for public programming. The children's Art Attack Program was suspended and replaced by free take home and in gallery activities – *Art in A Bag, Bumper Art Packs, Art Room activities* and *competition campaigns*.
- A new online program - *From the Artist* - was developed for patrons to 'attend' conversations with prominent Australian artists. The program was live streamed on the Gallery Facebook page and archived on the Gallery website with the intention to temporarily replace in-gallery floor talks. This program achieved 7000+ views in the first year.
- The Refinery 2020 was restricted to be delivered in an online capacity.

## 3.11 PROGRESS AGAINST THE ARTS PLAN GOALS

### How has the Sunshine Coast creative arts sector evolved in the 5 years since the Arts Plan was adopted?

The following graphic illustrates year-over-year growth of key performance metrics related to visitor satisfaction, cultural vitality\* and physical attendees of Arts Plan initiatives, including festivals, galleries, workshops, and programs across the past four financial years. Importantly, both satisfaction and cultural vitality scores remained stable, despite a drop in audience attendance over FY 2019/20 (induced by COVID-19), and continue to increase. In FY 2021/22, the Sunshine Coast reported an audience attendance figure nearly twice of that reported in FY 2019/20.



\*NB: cultural vitality indicates the level at which attendees at arts activities agreed to five statements relating to well-being, local economy, community pride, capacity building, and appreciation of the arts. This score is calculated as an average out of five.

The following table collates key performance metrics captured by Council, along with relevant statistics from the 2022 Arts Sector Survey, to illustrate the major outcomes that have been achieved since the Arts Plan was adopted in 2018.

Arts Plan Goal	Outcomes since 2018
1. Local artists and artistic content is developed and celebrated	<ul style="list-style-type: none"> <li>• 634,539 attendees to all Arts Plan activities (festivals, galleries, workshops, programs)</li> <li>• More than 100,000 online audience</li> <li>• 2,047 local artists engaged</li> <li>• 233 new art acquisitions</li> <li>• 949 public art works delivered 585 local artists engaged in Horizon Festival</li> </ul>
1.5: Foster opportunities for the creation and promotion of First Nations artistic endeavours.	<ul style="list-style-type: none"> <li>• Horizon Festival – since its inception in 2016 has delivered 40 First Nations events, featuring 726 First Nations Artists and Arts workers.</li> </ul> <p>Over the past 2 years the Creative Arts and Events Unit has:</p> <ul style="list-style-type: none"> <li>• Engaged with 414 First Nations Artists in the delivery of programming</li> <li>• Conducted 595 consultations with First Nations Artists.</li> </ul>
2. Arts audiences and creative opportunities flourish through investment and development	<ul style="list-style-type: none"> <li>• Established an arts levy at \$3 per rateable property in 2022</li> <li>• 286 projects funded through Council distributed grants worth almost \$1.5 million</li> <li>• In 2020/21 the Sunshine Coast Arts Foundation (SCAF) received \$125,000 in donations from 26 donors</li> <li>• 733 Council-led training development opportunities to 8,310 artists</li> </ul>
3. A dedicated network of places and spaces for artists to connect, create and collaborate (physical and virtual)	<ul style="list-style-type: none"> <li>• Developed a strategic Regional Arts Infrastructure Framework to guide Council in future arts infrastructure decisions and prioritisation</li> <li>• Over 50 new arts venues since 2017</li> <li>• Established the <i>ArtsCoast: Spaces for Creatives</i> program that seeks to activate a network of spaces across the region</li> <li>• Sub Tropic Studio</li> <li>• The Old Lock Up</li> <li>• 2nd Space</li> <li>• Established The Refinery incubator program which has supported over 60 creative entrepreneurs and shared their stories with millions through social media and over 1,000 people through industry events.</li> <li>• Working to develop a Business Case for a new regional gallery facility in Caloundra.</li> </ul>
4. Art and creativity is embedded in the identity and experience of the Sunshine Coast	<p>Council's three major arts platforms, Caloundra Regional Art Gallery, Horizon Festival, ArtsCoast have the following profile:</p> <ul style="list-style-type: none"> <li>• Almost 230,000 annual website visits in FY 2021/22</li> <li>• 25,000+ social followers</li> <li>• 20,000+ e Newsletter subscribers</li> <li>• Achieved 587 media placements with an audience reach of 9,389,175 and earned media value of \$2,134,829 in FY 2021/22.</li> </ul>

### 3.12 TRENDS IN THE ARTS

The following table summarises current trends in the arts which are unfolding on a macro level, alongside relevant case studies on the Sunshine Coast.

Trend	Description	National Context	Local Context
<b>Audience as centre-stage</b>	A cultural revolution is taking place which positions the audience as the centrepiece of creative experience. There is a growing need to understand, develop and involve the audience in deeper and more meaningful ways.	3 in 4 audiences in Australia are attending in-person events as of October 2022. <sup>16</sup>	<i>Horizon Festival 2022</i> ran nine participatory workshops across visual arts, performance, and storytelling.  <i>The Keeper</i> was a high impact, participatory live public art project.
<b>Digital goes Mainstream</b>	COVID-19 profoundly shifted people's digital behaviour and preferences. The need for digital engagement in the arts is increasing rapidly as a complement to live experience.	Digital pivoting identified as a key issue/opportunity in The Impact of COVID-19 on the Arts (Parliament of Australia). <sup>17</sup>  Key objectives of the Australia Council for the Arts Digital Culture Strategy are that 'Australian creative practitioners are digitally confident and proficient' and 'audiences can easily discover and access Australian arts and culture online by 2024'. <sup>18</sup>	<i>The Sunshine Coast Arts Prize</i> was live streamed in 2022 to an audience of 3,500.
<b>Sustainable synergies</b>	Sustainability and environmentally-conscious practice is a priority in the arts – a place where creativity and the natural environment converge.	'Promote the connection between art and other sectors' identified as a priority to support Australia's creative industries sector post COVID-19 recovery. <sup>19</sup>  In response to the Parliamentary Enquiry into Australia's Creative & Cultural Industries, SGS Economics & Planning identify five recommendations to progress the sector post-COVID. <sup>20</sup>	<i>Field Trip</i> features creative practice at the intersection of art, science, technology and the environment – the 2022 'Field Trip' focused on Planetary Health.  Maroochy Arts and Ecology Centre (Botanic Garden) is a specialised arts and ecology interpretive centre.
<b>Cross-sectoral partnerships</b>	The creative workforce is not exclusive to those who work within the creative industry – there is a great degree of interdependence on the arts.	Almost half of those employed in creative occupations work within non-creative industries in Australia.  Australia's creative and cultural industries sector makes an annual contribution of \$90 billion to the national economy. <sup>21</sup>	<i>The Refinery</i> is a creative incubator which has supported over 58 creative businesses and entrepreneurs since its inception in 2019.  <i>Sub Tropic Studio</i> is a creative testing ground for contemporary experimental art and design, an initiative by <i>Sunshine Coast Creative Alliance</i> .
<b>Shifts in labour, work, and training</b>	The challenges of COVID-19 have generated a major shift in how arts and creative industries operate – including an increase in those working in peripheral arts industries.	Average work hours of arts and recreation industry employees decreased by 21% between the March and June quarters of 2020, compared to the "all industry" average decreased of 5%  The Impact of COVID-19 on the Arts Inquiry identifies the impacts of COVID-19 on arts employment and income. <sup>22</sup>	42% work full-time, 25% work part-time, 25% work casually in the arts/creative sector.  39% said the arts represents 100% of their total annual income, 21% said it represents 10%.  25% earn \$1,000 - \$7,799 annually in the arts/creative sector. <sup>23</sup>



Image: The Keeper Project - Shannon Carol | Photo: Cooper Brady Photography

## 4. ARTS PLAN CONSULTATION 2022

The following chapter provides a detailed summary of what the sector said through consultation.

### 4.1 CONSULTATION SUMMARY

Consultation with Sunshine Coast stakeholders is a central part in the development of this Creative Arts Audit. Accordingly, with the support of *JOC Consulting*, Sunshine Coast Council facilitated several focus groups and telephone interviews with targeted stakeholders with a strategic lens on shaping the Sunshine Coast's future creative landscape. The following table summarises the details of these sessions.

Session	Date	Description
<b>Focus Group #1</b> Creative Arts Sector	Monday 19 September 2022, 10:30am - 12:00pm (90 mins)	<b>The Sunshine Coast's Creative Practitioners</b> A group of the Sunshine Coast's creative practitioners, entrepreneurs and mentors who provided a deeper understanding of the opportunities and barriers they see for the creative sector on the Sunshine Coast, their lived experience through and beyond the COVID-19 pandemic and their vision for the future of creative arts on the Sunshine Coast.
<b>Focus Group #2</b> SCAAB and Council	Tuesday 27 September 2022, 10:00am - 11:30am (90 mins)	<b>Council's Creative Champions</b> Members of the Sunshine Coast Arts Advisory Board (SCAAB) and Sunshine Coast Council staff who were integral to the development and implementation of the ArtsCoast Sunshine Arts Plan 2018 -2038, and who continue to deliver on the plan's objectives and vision.
<b>Focus Group #3</b> First Nations Creative Sector	Tuesday 27 September 2022, 1:00pm - 2:30pm (90 mins)	<b>The Sunshine Coast's First Nations Creative Community</b> A group of First Nations artists, consultants and business owners who shape the creative sector. This session aimed to understand the nuance of their experience and expertise and identify opportunities to further support First Nations artists, arts workers, and businesses on the Sunshine Coast.
One-on-one Private Sector Telephone Interviews (x6)	September and October 2022	A selection of senior stakeholders from the Sunshine Coast's private sector who have the potential to become the Coast's future creative champions and partners. Stakeholders include Visit Sunshine Coast, the Sunshine Coast Airport, SunCentral Maroochydore and Sunshine Coast Broadcasters. The interviews aimed to understand how these organisations currently partner with the creative arts sector, how partnering with the arts aligns with their business objectives, the barriers they perceive when working with the creative arts sector and the opportunities they see for future partnerships and collaborations.

### 4.2 THEMATIC OVERVIEW OF CONSULTATION

The following table provides a thematic overview of high-level themes that emerged from stakeholder focus groups and interviews. These themes identify the priorities for arts on the Sunshine Coast, including those both common and nuanced across stakeholder groups. Themes are further described and categorised in the next chapter, 'Results of SWOT Exercise from Consultation'.

Creative Sector	SCAAB & Council	First Nations Creative Sector	Private Sector
Value and perceived abundance of local talent.	Value and perceived abundance of local talent.	Need to build a pipeline of younger talent.	Generally high perceptions of the calibre and variety of local creative output.
Limited availability of affordable cultural infrastructure is a barrier. Opportunity for draw-card entertainment spaces and 'magnet' venues.	Opportunity for draw-card entertainment spaces infrastructure and 'magnet' venues.	Need for culturally safe infrastructure.	Need for transformational infrastructure that is commercial and marketable to visitors.
Potential and desire for cross-sectoral approaches and private sector partnership .	Need for greater awareness and buy-in from private sector for the arts.	Need to identify the First Nations champions within the private sector who can develop authentic partnerships.	Desire for more creative partnerships but need appropriate mechanisms and brokers to facilitate opportunities.
Educate community on the value of the arts and its breadth and value.	Solidifying the <i>ArtsCoast</i> brand and narrative is key to growth.	A First Nations-led approach to understanding cultural protocols, naming and representations. Acknowledgement of knowledge ownership and intellectual property rights.	Need to find a common language and optimise communications to build greater awareness of opportunities. Opportunity to improve promotion of the arts and the role of cultural tourism.
Limited funding and limited local arts market are barriers. Challenge of red tape and limited guidance provided by governments.	Need to diversify funding models (social enterprise, philanthropy, partnerships) and need for additional funding from a higher level (state or federal governments).	Need for significant investment and funding to drive a sustainable First Nations creative sector.	Need for ongoing investment and funding, including grants and sponsorships.
Desire to understand audience motivations and expectations, particularly around participatory experiences.	Professional development key to professionalising the sector. Emerging role of digital practices and need to build digital literacy to enable digital innovation.	Focus on connected Professional Development strategies that have a presentation outcome, inclusive of younger generation. Build networks of First Nations creative champions as leaders and mentors.	Focus on professional development, mentoring, and training opportunities to professionalise the sector.
Natural landscape identified as a key asset holding opportunity for place-based cultural offerings.	The newly named biosphere status is an asset to be leveraged.	Connections to Country and songlines are intrinsic to regions identity.	(not emphasised).

### 4.3 RESULTS OF SWOT EXERCISE FROM CONSULTATION

The following SWOT table thematically synthesises the key strengths, weaknesses, opportunities, and threats identified in consultation. On occasion, participants engaged in strengths-based responses, even when the topic of the prompting question related to barriers or challenges. Accordingly, many findings are interlinked: an emerging arts identity of the region (weakness) could be supported by embedded collaboration and partnerships (opportunity).

It should be noted that First Nations groups raised several nuanced considerations, which have been described separately where appropriate.

STRENGTHS <i>e.g. Which Arts Plan initiatives have had the most impact on the Sunshine Coast's creative sector and why?</i>	WEAKNESSES <i>e.g. What are the unique barriers faced by artists, arts workers, and businesses on the Sunshine Coast?</i>
<ul style="list-style-type: none"> <li><b>Beauty of the natural environment</b> Participants affirmed the value of the diverse biosphere on the Sunshine Coast. They perceived this as the greatest locational strength of the region, from the hinterlands to the Coast.</li> <li><b>Abundance of local talent and local champions</b> Participants praised the locally based talent and recognised the comparably high number of creatives working across the region.*</li> <li><b>Existing Council programs and support</b> Participants appreciated Council's existing programs and initiatives to support the arts. These programs not only had professional value, but also for capacity and connection building within the community.</li> <li><b>Improved reputation and sophistication</b> Participants identified that the arts have evolved and grown in recent years, to an industry that is recognised as both reputable and sophisticated. The high reputation of council-run initiatives and the genuine communities they have created was noted. Notwithstanding, advocacy remains a key challenge.</li> </ul> <p><i>*First Nations artists identified a key challenge within the community is identifying and leveraging new champions within the sector, as many are overcommitted and fulfil several roles.</i></p>	<ul style="list-style-type: none"> <li><b>No major draw-card cultural infrastructure</b> The lack of a 'magnet' and thus commercial cultural institution is a hindrance to attracting artists, programming, and audiences alike.</li> <li><b>Availability, affordability, and connectedness of infrastructure</b> Participants frequently identified infrastructure as a barrier for creatives, expressing a need for physical platforms to present their works.</li> <li><b>Emerging branding and identity</b> Participants expressed that the creative reputation of the region is still gaining momentum. They considered how as this identity is solidified, trust and confidence can be better built.</li> <li><b>Limited long-term investment and funding</b> Participants identified a lack of continuity in arts investment as a key barrier, more often from a higher state or federal level.</li> </ul> <p><b>First Nations</b></p> <ul style="list-style-type: none"> <li><b>Self-worth and expectations</b> Participants noted that maintaining a sense of self-worth as a First Nations artist is difficult, particularly when expectations of the nature and quality of First Nations art are hard to meet.</li> <li><b>Education of cultural protocols</b> Participants expressed that a key area for improvement is the education of Aboriginal culture, truth-telling, and ways of engagement within the arts.</li> </ul>

OPPORTUNITIES <i>e.g. Thinking to the future, what are the small and big opportunities for Sunshine Coast's Creative Arts Sector?</i>	THREATS <i>e.g. Reflecting on the past few years, how has the COVID-19 pandemic affected the way you work? What recovery efforts should be prioritised?</i>
<ul style="list-style-type: none"> <li><b>Focused audience development</b> Participants expressed a sense of deep value for audiences of the arts and saw opportunity to better tailor experiences to their needs. This included the opportunity to maintain audiences in 'down-times' (e.g. COVID, natural disaster), and use digital and experience-based trends to widen reach.</li> <li><b>Embedded collaboration and partnerships</b> Participants detected opportunities for the arts to leverage internal collaboration within Council, and external partnerships with the private sector. Philanthropy was often referenced as an untapped market in the region.</li> <li><b>Leveraging the 'ArtsCoast' creative landscape</b> Participants valued the prospect of place-based arts offerings which respond to the natural coastal landscape that the region is known for.</li> <li><b>Capitalising on the 2032 Olympics:</b> Participants saw an opportunity to leverage the 'creative festival' of the Olympics, capitalising on the brand and cultural draw card of this landmark event.</li> <li><b>Sustainable professional development opportunities</b> Participants emphasised opportunities to better support and up-skill artists by way of sustainably delivered professional development. They saw potential to 'professionalise' an industry which is often perceived as more independent from industries with more established reputations.</li> <li><b>New cross-sectoral approaches</b> Participants thought the arts could extend beyond the creative sector, and benefit from wider synergies between other sectors such as health, education, and especially tourism.</li> </ul>	<ul style="list-style-type: none"> <li><b>Advocacy for the value of the arts</b> Participants raised a broader ongoing challenge related to buy-in and education of the arts. Where creative arts are often considered outside of the central focus, they considered how the region could advocate for the arts as a valuable sector and cultural necessity that is worth investing in.</li> </ul> <p><b>First Nations</b></p> <ul style="list-style-type: none"> <li><b>Dispossession and knowledge ownership</b> Participants expressed the biggest barrier is the history of dispossession of Aboriginal peoples and their continual advocacy for knowledge ownership of artistic and intellectual property. They noted that continued education and 'truth telling' to further the mainstream's understanding of this experience and the nature of intergenerational trauma is vital.</li> <li><b>Tourism branding and style authenticity</b> Participants expressed those representations of First Nations art, in both creative and tourism branding, presents a narrow view of the diversity and complexity of First Nations arts (e.g. symbolism and iconography) and is often mis-representative and offensive.</li> </ul>

## 4.4 RESULTS OF VISIONING EXERCISE FROM CONSULTATION

Focus Group participants engaged in strength-based conversations when envisioning future opportunities for the Sunshine Coast's creative landscape. Participants responded to the following questions:

- What three words would you like to use to describe the Sunshine Coast's creative scene in 5 years?
- What do you think a successful creative sector would look like in 5 years? What do we need now to make it a reality?
- Thinking to the future, what are the small and big opportunities for Sunshine Coast's Creative Art Sector?

The below word cloud collates the most frequent words used by participants across all focus groups when responding to these future-focused questions. Participants want a future Sunshine Coast that encompasses:



Looking further into the words and sentiment shared by participants, recurring themes across all participants included:

- Strong First Nations / Kabi Kabi connections and representation
- A bold creative identity
- An independent sector (not just supported by Council)
- A place where artists can make a living
- Known for live music
- Multiple recognisable arts venues and festivals
- Embracing the 2032 Olympics.

Further, participants in the Council/SCAAB focus group were encouraged to consider opportunities to evolve the existing Arts Plan vision and asked: *Does our vision still hold true? Is there anything missing?*

***“The soul of our community is our flourishing arts ecology: nurturing connections, promoting experimentation and inspiring collaboration.”***

Broadly, feedback was positive, with suggestions for an improved vision related to minor semantics and phrasing of the statement. ‘Soul’ and ‘ecology’ were key words which were perceived as complex by some, suggesting these words could instead link the arts to a broader ecology, rather than one exclusively linked to the arts.

A selection of quotes from focus group participants related to the current vision is provided below:

- “I don’t like the use of the word ‘soul’
- “The word ‘soul’ is complex – could be off putting for some”
- “Key words still resonate – connection, experimentation, collaboration”
- “We need to speak to identity – arts and creativity are key to the identity of the region”
- “Ecology is still a good word. But it’s about a broader ecology – that of a region not just the arts.

## 5. TRENDS, ALIGNMENTS AND IMPACTS

### 5.1 FRAMEWORK TO ANALYSE FEEDBACK TRENDS

The Arts Plan provides a holistic approach to nurture and advance the regions’ arts ecology, and is broken down into four key focus areas, and the corresponding actions needed to achieve this. In reality, no plan or strategy can be distinctly divided into stand-alone goals, as they are often symbiotic, and the actions needed to achieve them are interrelated and complex.

For this report, we have created a framework (Appendix G) to analyse the feedback trends that we heard throughout consultation with the arts sector (through the 2022 arts sector survey and targeted focus groups), and key insights from the 2020 audience research report, and incorporated this into a table that shows:

1. Summary of feedback trend and select quotes
2. Alignment to the Arts Plan’s goals and strategies
3. Broader strategic alignment to the National, State and Regional documents discussed in section 2.4
4. The alignment with or impact on the Arts Plan.

The following section summarises the frequently mentioned feedback from consultation and the new ideas and trends that were raised and should be considered for inclusion in the refreshed Arts Plan. A core research question that drives this section is: ***“What will attract people to create, consume, and co-invest in the creative arts on the Sunshine Coast?”***

### 5.2 SUMMARY OF FEEDBACK TRENDS

#### Frequently mentioned feedback trends

In addition to the thematic overview of consultation themes (4.2) and the results of the SWOT exercise in consultation (4.3), the following section provides a summary of feedback themes heard across all consultation. The below feedback trends were the most frequently mentioned items across consultation that are already featured in the Arts Plan goals and actions in some form.

- **Professional development and capacity building:** professionalising the arts sector is integral to the next phase of the Arts Plan. The main levers identified through consultation focused on capacity building, particularly professional development programs that have a presentation or commercial outcome. This is interrelated with the other common themes such as elevating the calibre of the arts, this will in turn elevate the region’s creative profile and attract higher value partnerships.
- **First-Nations led:** ensuring the First-Nations actions in the Arts Plan, and subsequent professional development, delivery and presentation programs, are self-determined by First Nations creative leaders. Respecting and educating in relation to cultural protocols and practices was also raised as an area for development ‘across the board’.

- **Audience development:** understanding and meeting the expectations of contemporary arts audiences, particularly how their behaviours have shifted following the pandemic, was identified as a priority. Fostering genuine participation between artists and audiences is essential in creating a diverse range of meaningful and tailored experiences.
- **Brand and profile:** The Sunshine Coast's unique creative brand and narrative is fundamental to evolving the region's creative reputation. While the region's point of difference as the 'ArtsCoast' is gaining recognition, wider promotion, and advocacy for the value of the arts in general will be vital to shifting perceptions, unlocking funding, and attracting new audiences. Participants felt it was essential that the regions' creative brand is reflective of place and its rich First Nations culture.
- **Transformational cultural Infrastructure:** the lack of major 'transformational' cultural infrastructure in the region was raised by participants as a major barrier to talent, programming and thus audience and commercial development. Access to infrastructure was also flagged as a key action to progress over coming years. The Arts Plan has enabled the development of a strategic Regional Arts Infrastructure Framework to guide Council in future art infrastructure decisions and prioritisation.
- **Cross-sector partnerships and collaboration:** developing and strengthening cross-sectoral partnerships and co-investment will be critical to take the Sunshine Coast arts sector to its next level of maturity, and create more opportunities for artists, arts workers, and audiences. Developing cross-sectoral partnerships between closely related sectors such as tourism and hospitality, was also flagged as an opportunity. The private sector emphasised the need to develop the ecosystem of specialist intermediary brokers to bridge the gap between artists, the private sector, and consumers. The opportunity here is to include a strategy in the refreshed Arts Plan around bringing these brokers into the ecosystem. The main area of focus will need to be around profiling and facilitating networking between the creative sector and the intermediary sector.

## New feedback trends and ideas

The following feedback trends raised across the consultation were new items that are not featured in the current Arts Plan. They are largely reflective of changing times, new developments, and societal shifts since the first Arts Plan was delivered.

- **Digital art and digital capacity building:** the evolution of digital art and digital engagement was raised as a driver of change. A lack of digital literacy and confidence to adopt new technologies within the local arts sector was identified as a huge barrier that needs to be addressed with education and capacity building. There is an opportunity to align to *The Australia Council for the Arts Digital Culture Strategy* and their vision for a digitally enabled arts and creative industry by 2024.
- **Sunshine Coast Biosphere:** participants regarded the newly awarded Biosphere status, as one of the Sunshine Coast's most valuable assets firstly in attracting and inspiring artists to practice in the region and secondly, as a desirable backdrop for the presentation of the arts. As council develops the 'Sunshine Coast Biosphere brand', there is an opportunity to incorporate this into creative marketing and programming.
- **Covid recovery:** the need to build back stronger after the shifts and shocks of the pandemic was raised by participants. This included diversifying funding models and private sector partnerships to fill the gap of Covid grant programs and embracing new ways of working developed during the pandemic such as digital collaboration and presentation.
- **The 2032 Olympics and Paralympics:** the 2032 Brisbane games were identified as a major opportunity to grow the arts sector on the Sunshine Coast, although ambitions were tempered with realism about how much arts funding will be available based on previous years. There is an opportunity to align to the Olympics related goals and actions of the State Government's strategic documents, such as *Creative Together 2020 – 2030 (Arts Queensland)* and *Towards Tourism 2032: Transforming Queensland's visitor economy (Department of Tourism, Innovation and Sport)*.



Image: Dawn Awakening, Horizon Festival 2022 | Photo: Nic Morley

## 6. CONCLUSION

The inaugural Arts Plan aimed to set the foundations to stimulate a flourishing local arts sector creating infrastructure, support mechanisms and platforms to support and develop artists and arts workers. The insights captured in this report demonstrate that the Sunshine Coast's arts sector has matured and diversified since 2018. The statistics outlined in this report are supported by insights collated through consultation with people invested in or participating in the arts sector on the Sunshine Coast. Across consultation, participants acknowledged the growth potential of the arts sector and therefore, the maturing identity of the Sunshine Coast as a cultural destination.

### Working towards a refreshed Arts Plan

Encouragingly, most of the feedback trends heard during consultation, are reflected in the Arts Plan goals and actions, in some form, and often straddle multiple goals and actions. Frequently heard themes included:

- professionalising the sector and the importance of capacity building;
- ensuring a self-determined approach to First Nations actions and programs;
- gaining a deeper understanding of audience needs to aid audience development;
- elevating the regions' creative profile and brand;
- the need for major cultural infrastructure to unlock programming and commercial opportunities; and,
- the importance of strengthening cross-sectoral partnerships.

Some of the new trends and ideas raised in consultation that are not included in the current Arts Plan are largely reflective of new developments and societal shifts since the Arts Plan was delivered. Council should consider either revising existing actions or adding new actions that relate to the following trends:

- **Digital Engagement with the Arts:** Building digital literacy and adoption of new technologies.
- **The Sunshine Coast Biosphere:** Capitalising on the Sunshine Coast's newly awarded biosphere status from UNESCO.
- **Post-Covid recovery:** Building back sustainably post-pandemic by diversifying funding and embracing new ways of working and audience preferences.
- **Brisbane 2032:** Leveraging the audience development and funding opportunities presented by the 2032 Olympics and Paralympics.

The overarching Arts Plan goals still encapsulate the key focus areas needed to advance the region's arts ecology. Although some specific strategies were not touched on in consultation, the sentiment of the overarching strategies were discussed in some form. Some will need to be evolved to reflect the advancements made since the Plan was developed, notably the growth in creative infrastructure and programming and new funding mechanisms such the Sunshine Coast Arts Foundation and the Arts Levy. Additionally, the new governance structures and roles established - such as the Horizon First Nations Advisory Group, First Nations Creative Development Officer, the Sunshine Coast Arts Advisory Board First Nations sub-committee and new resourcing to strategically lead the development of the ArtsCoast brand - will impact the positioning of some strategies.

The next phase of the Arts Plan will be to evolve some strategies to incorporate the new trends and ideas raised during consultation and where necessary, refine and consolidate actions to reflect the sector's shifting priorities as it emerges from the pandemic and responds to new opportunities. More detail on these recommendations and the alignment to relevant National, State and Regional strategic documents is detailed in Appendix G.

### Evolving the Arts Plan Vision

Regarding the Arts Plan vision - *"The soul of our community is our flourishing arts ecology: nurturing connections, promoting experimentation, and inspiring collaboration."* Participants believed the essence of the statement still holds true particularly around connection, experimentation, and collaboration. More specific feedback was related to the complexity of the word "soul" with participants pondering whether another word could be more accessible and less intimidating. Given the feedback in response to future-focused visioning questions, there may be an opportunity to have a stronger emphasis on the region's First Nations roots, the natural landscape and incorporate the attributes that participants want the creative scene to be known for in 5+ years; a bold, independent, home to multiple recognisable arts venues and festivals and a place where artists can make a living.

### Refine the Arts Plan goals

A more agile and adaptable delivery capability could be achieved through the refinement of the planning framework. Furthermore, the trends identified in the consultation process, considered alongside the pillars of the national cultural policy, could support this refinement.

The literature review of numerous national and state creative/cultural strategies and plans, highlighted that most goals/focus areas are articulated starting with active verbs e.g. establish, create, strengthen, support etc. As the next iteration of the Arts Plan is refreshed, there is an opportunity to revise the description of each goal to follow this common format.

The current Arts Plan has 49 actions some of which straddle multiples goals. During the refresh there is an opportunity to refine the actions, integrating some to a higher order and remove or revise others that have been achieved or changed focus.

### Broadening the name of the Plan

The literature review also highlighted the opportunity to rename the Plan to be more in line with national and state documents that take a broader lens than just 'arts' and use terms such as 'cultural' (The Australian Government's *National Cultural Policy*, the Australia Council for the Arts *Digital Culture Strategy* or 'creative' (Art's Queensland's *Creative Together Road Map*). Creative seems to be the most commonly used descriptor when referring to this sector for example the creative economy, creative industries, creative workers etc.

### What's Next? Realising the Shared Vision

Council's appreciation for the role of the arts as central to a thriving community is evident in its corporate vision - *to be Australia's most sustainable region: Healthy. Smart. Creative.* The establishment of the Arts Plan, its associated structures, and years of consistent delivery against its goals - significantly the introduction of the Arts Levy - demonstrates Council's commitment to creating a thriving and sustainable arts sector. Through the various initiatives listed within this audit, it is apparent that Council values the artists and cultural institutions on the Sunshine Coast as a critical part of the economy and essential to the quality of life of its residents.

Throughout consultation we heard optimism, bold ideas, and intent to further propel the local arts sector into its next phase of maturity. The combination of a passionate arts sector; a committed Council, a board of invested creative advisors; and a new Arts Levy that can unlock new opportunities, is a powerful alliance to push things forward. This audit report provides an evidence base to inform the refresh of the Arts Plan, future planning, and advocacy efforts.

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Refer to Appendix F – Desktop Review Matrix for a comprehensive list of all other documents reviewed for this Report.





[www.sunshinecoast.qld.gov.au](http://www.sunshinecoast.qld.gov.au)  
[mail@sunshinecoast.qld.gov.au](mailto:mail@sunshinecoast.qld.gov.au)  
T 07 5475 7272 F 07 5475 7277  
Locked Bag 72 Sunshine Coast Mail Centre Qld 4560