Feasibility Study for an Arts and Culture Centre in the Town of Collingwood

Final Report

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Prepared for

Town of Collingwood

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Executive Summary

Background and Objectives

In January 2021, The Town of Collingwood engaged Nordicity and Giaimo Architects to undertake a *Feasibility Study for an Arts and Culture Centre in Collingwood*. This report represents the **findings, options,** and **recommendations as to next steps** based on the research, consultations and analysis conducted between January and August 2021. The purpose of the study was to: 1) **evaluate** the needs of the arts and cultural community in Collingwood; 2) **determine** if, and to what degree, there is demand for an arts and culture centre and, from there, 3) **assess** the feasibility of a new arts and culture centre in Collingwood.

The term "feasibility study" can represent a wide range of expected activities and outcomes. Here, Nordicity and Giaimo understood that the Town was embarking on this step when many details of an arts and culture centre had yet to concretize. The Town of Collingwood stated it would consider the project feasible if there was "*evidence of critical mass demand within the community and community backing for the establishment and sustainability of an arts centre through earned revenues, direct financial support, and/or taxation*."

On this basis, this study found that there should be sufficient demand from the community and from the surrounding area for a new performing arts centre, and that its development would be feasible provided its design and development, and start-up and operations were capably undertaken.

Different scenarios in choice of design, location, and capacity could meet the Town's objectives – which themselves depend on consensus as to the most pressing priorities. **Success depends on certain conditions being met**, namely: continued community buy-in, sound execution, successful marketing expertise and community outreach. While it is anticipated that an annual operating subsidy will be necessary, it should be manageable if the centre is successful in audience attraction and fostering community use.

Approach

A review of Collingwood's various municipal strategies demonstrated the prominent role of arts and culture in the town and the Town's commitment to supporting the sector's growth. From this prior rationale, the project team of Nordicity and Giaimo undertook the following steps in our approach: **public consultations through a survey**[1], **arts and culture stakeholder consultations** through interviews, a roundtable, site tours, and regular and ad-hoc updates with the Collingwood Arts, Culture and Entertainment (CACE) group.

In the analysis, **the project team adopted a conservative lens** as to assumptions arising from research (interviews, survey, and group discussions), demand forecasts, operating forecasts, business model considerations, analysis of comparatives, and capital cost and revenue estimates. At the same time, **we acknowledge the energy within the arts community and the various citizen associations fully behind the opportunity to bring about a much-improved arts and culture facility for Collingwood**.

[1] Working within COVID-19 restrictions via a successful online survey that reached over 1500 regional residents.

Vision for an Arts and Culture Centre in Collingwood

The project team put forward a preliminary vision for the arts and culture sector based on local consultations:

- *The Collingwood Arts and Culture Centre will be a place that celebrates Collingwood's vibrant arts sector and showcases it for Collingwood's residents, families, seasonal visitors and tourists.*
- *The Centre will attract touring performers/ performances that engage and entertain local and regional audiences.*
- *The Centre will complement the downtown's existing arts district, fulfilling a need expressed by the community for many years.*
- *The Centre will be designed to operate with minimum subsidy while being accessible to artists and all audiences.*

The Centre will be:

- **Accessible and Affordable** – governance and operating models were explored to embed accessibility into the fabric of the space, in particular the pricing of events and community access to the facility that makes it broadly affordable to the general public.
- **Flexible** and **Future-friendly** – creative space uses and technology solutions will aim to "future-proof" the facilities and be attractive to a wider and younger audience.
- A place to **Consume** but also to **Connect** – animated by the performances it showcases, there will be many other ways to participate on site through education, rehearsal spaces, a café and possibly incorporating outdoor space.

The Centre will:

- **Support** and **elevate** Collingwood's creators, providing a platform and professional quality home that befits their status and potential.
- **Engage** and **respond** to the needs of Collingwood's residents – e.g., seniors, families, seasonal visitors, and a burgeoning tech sector – for whom a creative environment is a proven factor in attracting and retaining top talent.
- **Bolster** Collingwood's positioning as a regional hub for arts, culture and entertainment.

Feasibility Findings and Directions

Given the starting point of this engagement and the conservative lens adopted, the project team's analysis has generated feasible options for green-lighting a professional performing arts centre. The main differentiation among options stems from a blend of:

- **Scale**: ranging from at minimum 400 seats and up to approximately 800 seats, plus other features considered "must-have";
- **Business model realities**: the degree to which success relies on drawing in regional and visiting audiences and better known artists and performers; and
- **Accessibility to the local arts and culture sector**: the share of the local arts and culture sector that will realistically be able to take advantage of the facility at affordable price points.

Seating capacity is the simplest way to differentiate the options, but each direction is explored in more detail beyond the simple capacity metric throughout the study. Broadly, the project team has articulated two scenarios at two different capacity levels:

Scenario 1. **A ~400-600 Seat Performing Arts Centre:** At this capacity, "name" acts (musicians, shows, productions, performers, comedians etc.) would consider the venue intimate and attractive to them if tickets for such performances were priced at a premium. Nevertheless, this audience capacity level would still limit the pool of acts and performers that could be booked for the venue.

- Size Estimate: Approximately 38,000 sq. ft. - 45,300 sq. ft.
- Animated primarily (70-80%) by community-driven activity and 30% "tour"-based (but with the touring share subsidizing much of the community rentals).

Scenario 2. **An ~800 Seat Performing Arts Centre:** At this capacity there is greater opportunity to attract *some* "name" acts (musicians, shows, productions, performers, comedians, etc.) because ticket sales could generate enough revenue to cover their fee, while the per ticket cost may remain relatively affordable. While this size of venue is beyond the stated needs of the existing arts and culture sector in Collingwood, it does provide more adequate facilities that can accommodate the Town's potential growth and identity for the coming 10-15 years.

- Size Estimate: Approximately 75,900 sq. ft. - 84,000 sq. ft.
- Aims closer to a 50:50 split between community-driven activity and the booking of a wider range of outside artists and shows (and where community usage is also supported and subsidized).

For either scenario there remains the option of **developing a much smaller stage within the arts and culture centre**. In doing so, it would follow a trend among new arts facilities constructed over the last couple of decades. Such a venue could become Collingwood's local black box or incubator space for emerging and experimental work. While the construction of a small stage in addition to the main stage is a possibility within a new facility, the Town already has a smaller theatre in operation – the **Simcoe Street Theatre (SST).** It has certain accessibility deficiencies as it now stands but could be renovated to make the required improvements. Therefore, whatever capacity scenario is adopted, renovation of the SST could provide the answer to the need for a complementary small-sized stage.

Location Considerations

The critical location requirement is to ensure that a new arts and culture centre connects with and relates to Collingwood's overall arts eco-system. The location analysis conducted by the project team recommends that the Downtown and Waterfront areas of Collingwood are most suitable for a new arts and culture centre. In particular, a cluster of cultural amenities located within or near the Downtown Heritage Conservation District, as well as the projected growth and development outlined in the Collingwood Waterfront Master Plan, indicate an opportunity for an Arts District within the downtown waterfront area that could serve both local community needs and visitors. Several sites were considered within the Downtown and Waterfront area (including the Eddie Bush Arena, The Leisure Time Club, the Grain Terminals and parking lots) and further assessed as part of the study process.

Business Model

The analysis of Collingwood's regional demographics and household spending showed that Collingwood's market size does not alone justify a major performing arts centre (despite its faster than average growth).[2] External stakeholders agreed, however, that a performing arts centre in Collingwood would complement the attractiveness of the region and support its year-round tourism

[2] More analysis provided in Appendix A: Collingwood Market Assessment

draw and related economic impacts. Reasonable estimates of visitor attraction were therefore assumed in the revenue forecasts for a new arts centre.

While the detailed financial analysis underlying the two capacity scenarios point to feasibility given a reasonable Town subsidy and the raising of sufficient capital to pay for construction and start-up, there are accessibility and affordability challenges embedded in each scenario. The core objective is to design a business model that will enrich the Town's local arts and culture sector, provide facilities at accessible price points to local residents *and* attract the type of acts and performers that make the space economically viable. Each option relies on effective marketing and talent attraction to meet earned revenue targets and margins to support an affordable pricing structure for the local arts community.

It is understood that the arts and culture centre would be home to the following type of events:

- **Ticketed:** shows presented by large (relatively-speaking), commercial organizations (e.g., a Live Nation concert, a touring show, comedy etc.). This type of event would take place in the performing arts facility (including control room, sound and light, dressing room, wardrobe, etc.), with access to the concession stand/bar and lobby.
- **Community**: shows presented by local independent arts and culture organizations (e.g., Theatre Collingwood performance). This type of event would take place in the performing arts facility (including control room, sound and light, dressing room, wardrobe, etc.), with access to the concession stand/bar and lobby. This type of event would pay a lower rental fee and production staff would be more limited than a full commercial production.
- **Rehearsal**: space rented by organization to prepare and rehearse shows. This type of event would take place in the dedicated rehearsal space.
- **Classroom**: rooms rented for meetings and educational events. This type of event would take place in the dedicated education space and/or meeting rooms.
- **Events**: space reserved for large receptions, weddings, parties. For these events, patrons would have access to the lobby and café, and outdoor space.

The following table summarizes the cash flow from construction to year 5 of operation for both the 400-seat venue and the 800-seat facility.[3] Attention should be paid to the cash flows from financing. Financing can be broken down into two components:

- First, grants are annually awarded to the cultural centre to cover a portion of operating costs. The larger facility (scenario 2) is likely to be more self-sufficient as it might attract more business from larger, unsubsidized out-of-town promoters: the annual grant is therefore lower than in scenario 1 despite the larger facility and the higher operating costs.
- Second, seed investment generates initial momentum by supporting the construction of the facility. In this model, seed investment is primarily provided by the Town of Collingwood but also requires a robust fundraising and capital cost campaign to raise funds from private donors and sponsors. Remaining costs would need to be financed through government contributions (e.g., Province of Ontario) or debt. The latter and would come with additional associated costs, and any meaningful debt would likely be a non-starter (bridge financing is a different form of short-term debt and therefore likely far more palatable).

[3] Note that these cash flow statement analysis reflect the **lowest infrastructure cost version** of each size of facility

A detailed analysis of the potential users for each type of event, at estimated pricing levels and operating costs, showed the need for an annual subsidy from the Town in both scenarios. The estimates of the required subsidy in both scenarios are shown in the following table[4]:

		Year 1	Year 2	Year 3	Year 4	Year 5
Scenario 1	Operating Income	- $312,467	- $221,655	- $179,999	- $159,171	- $130,843
	Operating Grant	$250,000	$250,000	$250,000	$250,000	$250,000
	Net Cash Flow	**- $62,647**	**$28,345**	**$70,001**	**$90,829**	**$119,157**
Scenario 2	Operating Income	- $388,674	- $307,515	- $219,935	- $175,145	- $130,355
	Operating Grant	$250,000	$250,000	$250,000	$250,000	$250,000
	Net Cash Flow	**- $188,674**	**- $9,515**	**$80,065**	**$124,855**	**$169,645**

Of course, the assumption is that there is no ongoing capital cost debt charge, and that the capital costs are financed through government and private grants, or donations. This assumption is not unreasonable in the financing of such a facility. The total capital cost of the two sizes of venue are as follows:

Construction costs	Scenario 1	Scenario 2
Low	$16.4 million	$32.0 million
High	$25.2 million	$49.1 million

Finally, it is important to show the assumptions underlying the split between "ticketed" and "community" programming. The larger stage venue has higher operating costs and it is assumed to have a higher proportion of ticketed programming – which is another term for acts and performers from outside the Town – meaning that the pricing is higher for the larger stage, resulting in more reliance on outside acts than on community usage.

Auditorium rentals in Year 5	Scenario 1	Scenario 2
Ticketed	56 (30% of programming)	88 (47% of programming)
Community	130 (70% of programming)	98 (53% of programming)

Community event rates	Scenario 1	Scenario 2
Auditorium rental rate	$300	$450
Labour cost	$1,050	$1,575
Total cost to renters	$1,350	$2,025

[4] Though presented as exact figures, the amounts presented in this table are estimates based on a range of assumptions and should be considered approximations.

Conclusions

This study found that the development of an arts and culture centre would be feasible provided its design and development, and start-up and operations were capably undertaken. The range of options include inherent risks in implementation. While it is tempting to cast the smaller facility as the "less risky" of the two, the larger venue would be more attractive to outside performers and acts seeking a minimum threshold of profit for performances. A smaller-sized venue, however, is more within reach of the local sector as it is today, but may fall short as Collingwood grows. Determining the optimal capacity will require further investigation and may lie in the upper end of Scenario 1, towards 600 seats. Despite higher upfront costs, fundraising efforts and a strong capital campaign could bring an 800-seat venue more to the fore, but would require clear commitments to accessible and affordable programming for local users.

The next steps proposed here aim to capitalize on the momentum created by the presentation of this analysis to Council. Much will reset on the direction Council wishes to pursue. The following action items support an initial roadmap for advancing to the next implementation phase – whether internally or through a competitive RFP process:

- **Adjust and refine the pricing strategy and fill capacity along the spectrum of seating scenarios from 400 to 800 seats:** Nordicity's modelling tool is dynamic and will be shared with the Town of Collingwood to support updated usage and demand forecasts based on new information following this report.
- **Re-engage key stakeholders and practitioners to ascertain their commitment and buy-in for the arts and culture centre – and in what capacity**: Socialize this report amongst Collingwood's arts and culture stakeholders, organizations and members of the public to gain buy-in, and expose gaps and areas for further consideration. Engage The Collingwood Arts, Culture, and Entertainment Group (CACE) and assess their realistic capacity for fundraising and capital campaign. Work with owners Rick and Anke Lex to assess potential vision and investment in Simcoe Street Theatre.
- **Engage with regional partners, and industry associations and funders to share findings, assess implications/impacts and identify potential partnership strategies:** Meet with, for example, Blue Mountain Resort, South Georgian Bay Tourism, surrounding municipalities including Town of Barrie Economic Development, local Indigenous leaders, etc. Connect with Canadian Live Music Association, Ontario Presents and other broad stakeholders to inform of vision, ambitions and overall strategy. Identify and prepare funding applications for, for example, Canada Cultural Spaces Fund and other sources of public funding.
- **Depending on the response to the findings in this report, advance "prebuilding initiatives":** Explore benefits and drawbacks of an anchor tenant in the centre, as well as interest from the sector. Familiarize local sector with the ticketing and pricing assumptions embedded in the model and potential impacts on their own ambitions. Support audience development, fundraising (donor base) and early programming vision with showcase opportunities for a range of Collingwood's artists (and the region).
- **Whether through external RFP or internal task force, advance site selection and capacity determination based on the findings of this study:** Determine final facility size, seating capacity, land requirements and building size and move forward with site selection.
- **Identify and select desired governance strategy and consider early recruitment, pre-build, for bold/top notch marketer and programmer:** Recognizing that at any size/capacity, there is enormous marketing pressure on this facility to be a success. The

optimal programmer/manager would be engaged well in advance of opening to forge connections and promote the venue long before it is available to rent.

This study represents a vital step in the long journey towards bringing an arts and culture centre in the Town of Collingwood to realization. It has advanced and concretized the vision, concept and features, key success factors and the business model for a spectrum of feasible options. The objectives for an arts and culture centre can be achieved; the direction pursued, however, will depend in part on the prioritization of those objectives – balancing the needs of the local community today and the vision for growth heralded in the coming decade.

1. Introduction

In January 2021, The Town of Collingwood engaged Nordicity and Giaimo Architects to undertake a Feasibility Study for an Arts and Culture Centre in Collingwood. This report represents the findings, options, and recommendation as to next steps based on the research, consultations and analysis conducted between January and August 2021.

1.1 Objectives and Approach

The purpose of the study was to:

- evaluate the needs of the arts and cultural community in Collingwood
- determine if, and to what degree, there is demand for an arts and culture centre and, from there,
- assess the feasibility of an arts and culture centre in Collingwood.

Feasibility studies can be initiated at varying stages of a planning cycle from early ideation and concept development to the economic basis on which a project is executed. As such, the term "feasibility study" can represent a wide range of expected activities and outcomes. In this context, the project team of Nordicity and Giaimo understood that the Town of Collingwood was embarking on this important step at a point when many of the details of a potential facility had yet to concretize.

The concept of a potential arts and culture centre in Collingwood had circulated for decades and been highlighted in multiple municipal planning strategies. Local stakeholders have expressed certain preferences for the composition of a new arts and culture centre but, ultimately, the scope of the proposed facility remained relatively open at the time of the project's launch. The Project Team was aware that the Town of Collingwood would consider the project feasible if there was "*evidence of critical mass demand within the community and community backing for the establishment and sustainability of an arts centre through earned revenues, direct financial support, and/or taxation*." On this basis, this study found there should be sufficient demand from the community and from the surrounding area for a new performing arts centre, and that its development would be feasible provided its design and development, and start-up and operations were capably undertaken. This feasibility study recommends next steps toward achieving the goal to develop an arts and culture centre that meets the Town's needs and is sustainable.

Different scenarios in choice of design, location, and capacity could meet the Town's objectives – which themselves depend on consensus as to the most relative priorities. **Success depends on certain conditions being met**, namely: continued community buy-in, sound execution, successful marketing expertise and community outreach. While it is anticipated that an annual operating subsidy will be necessary, it should be manageable if the centre is successful in audience attraction and fostering community use.

The project team abided by broad best practices for cultural facilities studies[5] including:

- Formulate an **understanding of local context and needs of the community**
- Identify **gaps in existing capital and cultural resources**

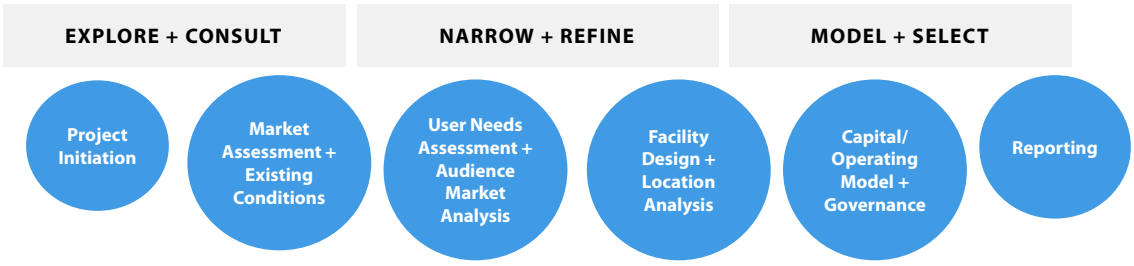
[5] Based on reviews of the Cultural Facilities Priorities Plan (City of Vancouver, 2008); Making Space for Arts and Culture (City of Vancouver, 2014); and Planning for Cultural Facilities (Artscape Toronto, 2016).

- Assess the **needs of cultural organizations/sectors that do not have adequate resources** (e.g., facilities, equipment, etc.).
- Engage with **a diverse group of stakeholders**.
- Develop **evaluation criteria for site options**, such as public accessibility, size, partnership/growth potential, and zoning.
- Consider **regional context and opportunities for co-ordination**.
- Develop recommendations that consider the **current and future types of activities and intended audience** for the space to accommodate.
- Consider the growth of **community arts vs. increased tourism** in all recommendations.
- Evaluate and confront realities of **economic sustainability**.

The proposed approach, shown broadly below, included:

- Emphasis on **public consultation**, working within COVID-19 restrictions via a highly successful online survey that reached over 1500 regional residents.
- **Connecting with local arts and culture stakeholders** through interviews, a roundtable, site tours and regular updates with the Collingwood Arts, Culture and Entertainment (CACE) group.
- Taking a **conservative lens** as to assumptions arising from research into demand forecasts, operating, and business model considerations and capital cost and revenue generation estimates.
- **Acknowledging the energy within the arts community** and the various citizen associations fully behind the opportunity to bring about a much-improved arts and culture facility for Collingwood.

Figure 1 Feasibility Study of an Arts and Culture Centre Approach



More detail on our approach, methodology and survey responses can be found in the Appendices of this report.

1.2 Policy Context

The Town of Collingwood's 2008 *Arts & Culture Policy* states that the Town's goal is to "help individuals, groups and organizations realize their full creative, social and economic potential to the greater benefit to all citizens." The Town recognizes the importance of arts and culture to Collingwood, noting their definition includes a vast array of components from heritage, history, and design to performing arts, media, artistic expression and creativity across all economic sectors. In addition, this 2008 vision recognized:

- Downtown Collingwood as a **vital arts and culture core and destination**;

- **Access to the arts** as the right of every person;
- The value of **creativity and imagination**;
- The value of **hosting arts and cultural festivals and events** regularly;
- The value of **developing communication networks** for artists & artisans;
- Collingwood's evolving identity as an **inclusive, diverse, innovative** community anchored in its heritage; and,
- The value of **long-term investment and collaborative planning**.

This policy document further lists six key principles of arts and culture in Collingwood, namely:

- Importance of arts and culture
- Sustainability and growth of arts & culture
- Economic impact of arts and culture
- Municipal support and capacity building for arts and culture
- Availability of facilities
- Access to arts and culture

These principles **explain the value of supporting arts and culture for Collingwood's community** development, while **recognizing the economic value** that these sectors of the economy can make in return.

The Town of Collingwood **Community Based Strategic Plan** (CBSP), adopted in 2015 and refreshed in 2020, outlines the community's vision and goals over a 20-year span. This plan recognizes the town's important role as a growing regional hub, positioned for even further growth. One of CBSP's five goals is to "Encourage Diverse Culture and Arts Offerings." Embedded within this goal is the objective to "support local artists and encourage arts and culture" in part by "carrying out a feasibility study for an arts centre and/or other recommended supports."

This recommendation is echoed too in the Town of Collingwood Parks, Recreation and Culture Master Plan (adopted in 2019) which suggests to, "Review the feasibility and sustainability of multi-function arts and cultural centre for Collingwood" and later, "Develop a facility feasibility study for a new multi-purpose community recreation facility at an appropriate location." Finally, a 2019 community survey also flagged the importance of an arts and culture centre feasibility study.

Research conducted for the PRC Master Plan found that locals frequently attend arts and cultural events outside of Collingwood. Stakeholders consulted expressed a desire for the development of a collective arts hub and a larger performing arts centre to create a space to attract both local and tourist communities to the area. To achieve this aim, the PRC Master Plan makes a range of suggestions from designating a 'Culture Month' for Collingwood to market its cultural assets to the local community and developing a cultural tourism strategy to developing a cultural innovation initiative to encourage the creation of innovative activities and events alongside an approach to attract, develop, sustain and promote cultural businesses.

These strategic policy documents display the prominent role of arts and culture in Collingwood. The Town of Collingwood values its arts, culture, and creative assets and is committed to providing the necessary infrastructure to support them.

1.3 A Vision for Collingwood's Arts and Culture Centre

Nordicity and Giaimo developed the following high-level vision for an Arts and Culture Centre in Collingwood to match the needs expressed by the local community and insights from industry stakeholders.

> *The Collingwood Arts and Culture Centre will be a place that celebrates Collingwood's vibrant arts sector and showcases it for Collingwood's residents, families, seasonal visitors and tourists.*
>
> *The Centre will attract touring performers/ performances that engage and entertain local and regional audiences.*
>
> *The Centre will complement the downtown's existing arts district, fulfilling a need expressed by the community for many years.*
>
> *The Centre will be designed to operate with minimum subsidy while being accessible to artists and all audiences.*

The Centre will be:

- **Accessible** and **Affordable** – governance and operating models will explore ways to embed accessibility into the fabric of the space, and anticipate the pricing of events and access to the facility that is broadly affordable to the general public.
- **Flexible** and **Future-friendly** –creative space uses and technology solutions will aim to "future-proof" the facilities and be attractive to a wider and younger audience.
- A place to **Consume** but also to **Connect** –animated by the paid performances it houses as well as many other ways to participate on site through education, rehearsal spaces, a café and possibly incorporating outdoor space.

The Centre will:

- **Support** and **elevate** Collingwood's creators, providing a platform and professional quality home that befits their status and potential.
- **Engage** and **respond** to the needs of Collingwood's residents – namely seniors, families, seasonal visitors, and a burgeoning tech sector – for whom a creative environment is a proven factor in attracting and retaining top talent.
- **Bolster** Collingwood's positioning as the region's hub for arts, culture and entertainment.

1.3.1 Sharpening the Options

Through the course of the feasibility study:

- Public consultations showed **strong interest within Collingwood and the region in investment in the development of an arts and culture centre**.
- The local arts and culture community – from performing arts, to dance to music and visual arts – expressed their priorities and needs and could demonstrate how **the lack of arts and cultural spaces hinders their ability to grow and succeed**.
- The original scope of work was to look broadly at an arts and culture centre feasibility – with openness as to features, focus, location etc. **The lack of adequate and affordable performance and rehearsal venues quickly emerged as the leading facility gap for the sector – elevating having a professional stage to the core of the centre**.
- Analysis of indicators such as regional demographics and household spending showed **conditions that mainly align with the success factors for cultural facilities** but also that

Collingwood's market size does not *alone* justify a major performing arts centre (despite faster than average growth).[6]

- To attract a bigger chunk of the disposable income dollar, there would be **"must have" amenities from quality to flexibility to state-of-the-art performance facilities** and more.
- There was a strong desire to perceive the building of an arts centre as **a growth pole in or adjacent to the downtown cultural district.**
- **The facility would rely heavily on drawing in a regional population and the Collingwood weekenders for entertainment offerings provided by well-known talent.** External stakeholders agreed that a performing arts centre in Collingwood would complement the attractiveness of the region and support its year-round tourism draw and related economic impacts.

There were different views on what it will take to attract name acts, including the optimal size/capacity. A core challenge is to find a solution that will enrich the Town's local arts and culture sector, be accessible to these locals *and* attract the type of acts and performers that make the space economically viable.

Given the starting point of this engagement and the conservative lens adopted, the project team's analysis has resulted in narrowing down a shortlist of options for advancing with a professional performing arts centre. Each option has a theatre stage at the heart of the concept. The differentiation lies in a blend of:

- **Scale**: ranging from at minimum 400 seats and up to approximately 800 seats;
- **Business model realities**: the degree to which success relies on drawing in regional and visiting audiences and better known performers;
- **Accessibility to the local arts and culture sector**: the share of the local sector that will grow (or be able to grow) towards taking advantage of the facility.

All options represent a big step for the community, providing capacity beyond the main existing larger venues – the New Life Church and The Gayety[7] and current capacity of the Simcoe Street Theatre. All options rely on highly effective marketing and talent attraction to generate target earned revenue targets and margins to support the more affordable uses by the local arts community. In terms of the ongoing impacts of COVID-19 on the arts and culture sector, and particularly live performance, the consensus was that as we are looking at least two to three years into the future for development, the hope would be that while we are forever affected, challenges wrought by the pandemic may be better managed.

The seating capacity is the simplest way to differentiate the options, which exist on a spectrum from 400 to 800 seats and are explored in far more detail throughout the study:

1. **A ~400-600 Seat Performing Arts Centre:** At this capacity, "name" acts (musicians, shows, productions, performers, comedians etc.) would consider the venue intimate and tickets for such performances would need to be priced at a premium. Nevertheless, this size of venue would limit the pool of acts and performers that could be booked for the venue.

[6] More analysis provided in Appendix A: Collingwood Market Assessment

[7] Through the course of this study, the project team has been unable to connect with The Gayety's owner and operator and so were not able to assess that venue in terms of meeting the arts and culture sector's future needs.

2. **An ~800 Seat Performing Arts Centre:** At this capacity there is a greater opportunity to attract more "name" acts (musicians, shows, productions, performers, comedians etc.) in part because ticket sales could generate enough revenue to cover their fee, while the per ticket cost may remain relatively affordable. While this size of venue is beyond the stated needs of the existing arts and culture sector in Collingwood, it does provide more adequate facilities that can accommodate the Town's potential growth and identity for the coming 10-15 years.

Often, larger scale performing arts centres include a second, smaller stage for rehearsals and/or producing more experimental work. In some cases, however, municipalities support a cultural district approach, supporting multiple venues to flourish, each with various niches (on a very large scale one could think of Arts Commons in Calgary's Cultural District with five theatres ranging from 60 to nearly 2000 seats). As with Toronto's The Theatre Centre, among others, these venues are typically flexible; programming can be experimental, audiences are being developed, and the work is best suited to an intimate environment or vibe. A "rehearsal stage" is included in the 800 seat scenarios in this report but alternative approaches could be explored and refined using Nordicity's modelling tool.

In the fruition of either scenario above (though especially on the larger end), it could be advantageous, and in keeping with the community's interests, to also support **a renovation of the Simcoe Street Theatre as Collingwood's local black box or incubator space**. Importantly, Rick and Anke Lex, owners of Simcoe Street Theatre, have explored the potential of renovating the current venue up to 290 seats in one scenario and a maximum of 374 seats in a second. While the project team concluded that a smaller arts centre of that size would replicate existing facilities and not meet the Town's current or future needs, we recognize the advantages from maintaining and investing in the existing space, to complement the sector's growth aspirations.

To pursue any of the options (or combination thereof) presented requires further consultation with the local arts sector and community to gain their reactions and then further refinement of assumptions and inputs embedded in current model. From that additional research and consultation, the Town and key stakeholders would be in a position to advance with location selection, fundraising strategies, and governance structuring.

The rest of this feasibility study documents the results of the project team's research and consultations, key findings and assumptions relating to the possible directions for moving forward including risks and rewards.

2. Collingwood's Community Priorities

According to data collected by McSweeney & Associates in the *Collingwood Community Profile* approximately 5% of Collingwood's labour force was employed in arts, entertainment, and recreation in 2014.[8] From Creative Simcoe Street and the Simcoe Street Theatre to its festivals, museums, markets, parks and gathering places, Collingwood residents and visitors can enjoy rich and entertaining arts and cultural experiences (complemented by fine dining and educational programming) all year round. As the population grows and changes, so too do community needs evolve and demand for services increase.

In this section we draw on the online survey, interviews, roundtables and external research to characterize both the public and arts and culture sector's priorities for a potential arts and culture centre in Collingwood.

2.1 Public and Arts & Culture Sector Consultation Results

The project team launched an accessible online survey that was in the field from late February to late March 2021. The goal was to gather feedback from both members of the public and the arts and culture sector about the demand for an arts and culture centre in Collingwood. The survey received a great turnout, gathering **1635 usable responses over a four-week period**.[9]

Subsequently, the project team held a series of individual and group consultations with representatives from the following arts, culture, and creative sectors:

- Performing Arts and Dance
- Film/TV and Digital Industries
- Music Recording/Production
- Music, Live Music and Festivals
- Visual Arts
- Facility Operators[10]
- Local Arts, Culture and Entertainment Advocacy Group CACE

The results of these consultations, and preliminary survey results, were presented, discussed, and validated during **a virtual roundtable with more than 20 arts and culture sector representatives** in attendance.

In terms of the survey results, a detailed breakdown of the respondents is provided in Appendix A. When reviewing them, it is important to note some limitations with the profile of the respondents:

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[8] For comparison, in 2016, some 5% of Canada's overall labour workforce were cultural workers according to Hill Strategies *Artists in Canada's Provinces and Territories in 2016*.

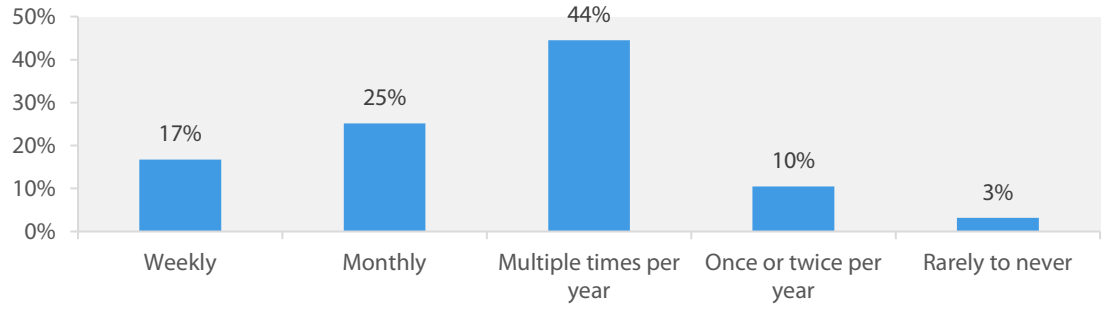
[9] The majority (75%) of survey respondents were Collingwood residents. The surrounding region(s) (defined as "within an hour's drive") were also well represented, with 22% of respondents. The remaining 3% were based elsewhere with other Collingwood connections (e.g., seasonal visitors).

[10] Through the course of this study, the project team has been unable to connect with The Gayety's owner and operator and so were unable to explore the potential future of that venue in terms of meeting the arts and culture sector's needs.

- **Open participation:** This type of survey will attract an engaged audience with the time available to participate and so, despite the strong turnout, cannot be deemed "statistically significant" as far as how it represents the views of Collingwood's residents.
- **Skewed older:** More than half of respondents were of retirement age, with just 10% representation from community members aged 18-44. That means that retirees were over indexed, and younger adults under indexed against the Collingwood population. That said, some 324 respondents or **20%** of our sample noted having children under the age of 18 living at home providing, indirectly, some representation of younger residents.
- **Accessible:** While paper copies were available in the library and Town Hall, it was a primarily online survey being promoted during Ontario's second wave of COVID-19 and may have been inaccessible to some potential participants.

Indeed, the survey response profile indicates a high number of active respondents in terms of arts participation in some manner or another. Thus, the arts community seems to have been quite engaged in the online survey and is a testament to their engagement in the arts in Collingwood, as displayed in the chart below:

Figure 2: Frequency of arts participation in Collingwood among regional residents

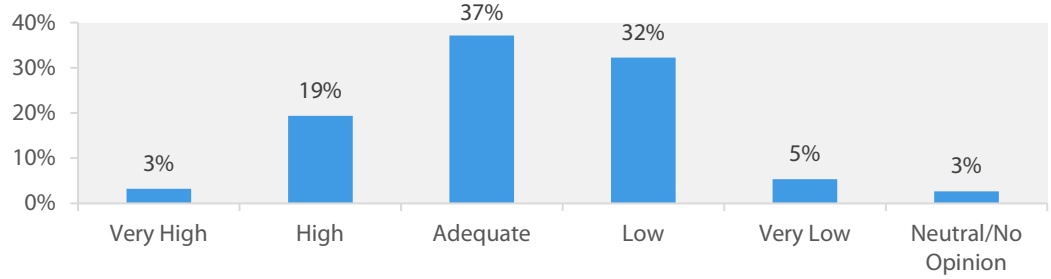


n=1511
Source: Collingwood Arts Centre Feasibility Study survey by Nordicity, 2021

- Nearly half of respondents (42%) indicated participating in arts activities on a weekly or monthly basis.
- The largest share of respondents (44%) reported participating in arts activities multiple times per year.

However, when asked how they perceive the number of performances and entertainment offerings in Collingwood, survey respondents indicated the following.

Figure 3: Respondents' perception of the number of performances/entertainment offers in Collingwood

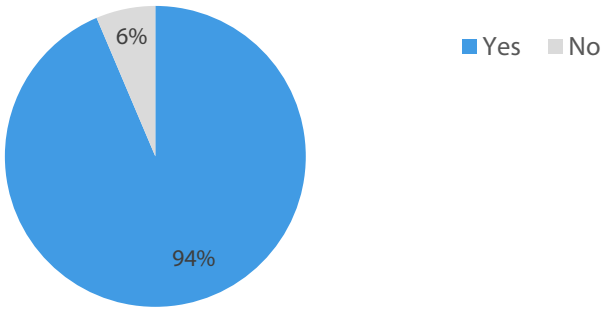


n=1622
Source: Collingwood Arts Centre Feasibility Study survey by Nordicity, 2021

- While this group is highly active in art participation, only a third of respondents (35%) indicated they believe Collingwood has a low or very low number of entertainment offerings.
- A slightly larger share (37%) believes there is an adequate amount of entertainment offerings in Collingwood.

Ultimately, the survey showed that 94% of Collingwood-based respondents support the development of an arts centre in Collingwood if proven to be feasible, as shown in the chart below.

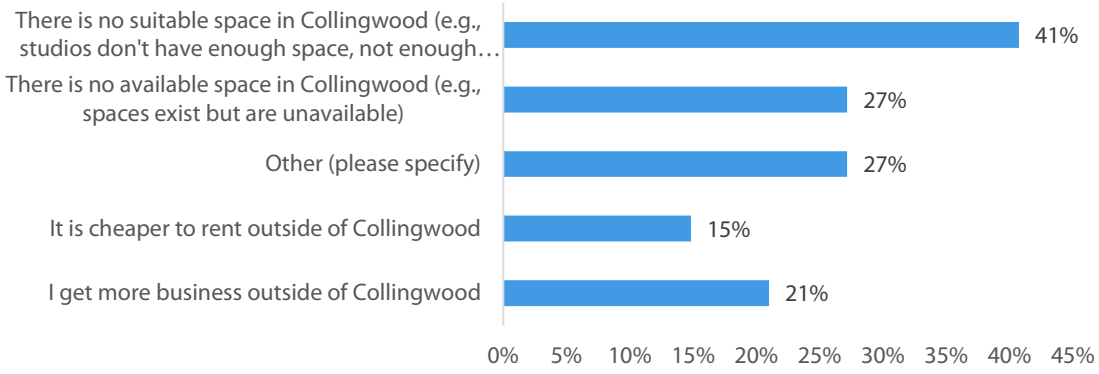
Figure 4: Share of Collingwood-based respondents that support the development of an arts centre if proven feasible



n=1159
Source: Collingwood Arts Centre Feasibility Study survey by Nordicity, 2021

Focusing on the survey respondents who work in the arts business, 15% (239) responded as practicing artist/cultural workers, and 3% as owner/operators of a cultural organization or facility. Of this group of respondents, the survey revealed that 59% of Collingwood's culture sector respondents use facilities located outside of Collingwood to participate in arts related activities. Their reasons for doing so are presented in the chart below.

Figure 5: Reasons Collingwood artists use facilities outside of Collingwood

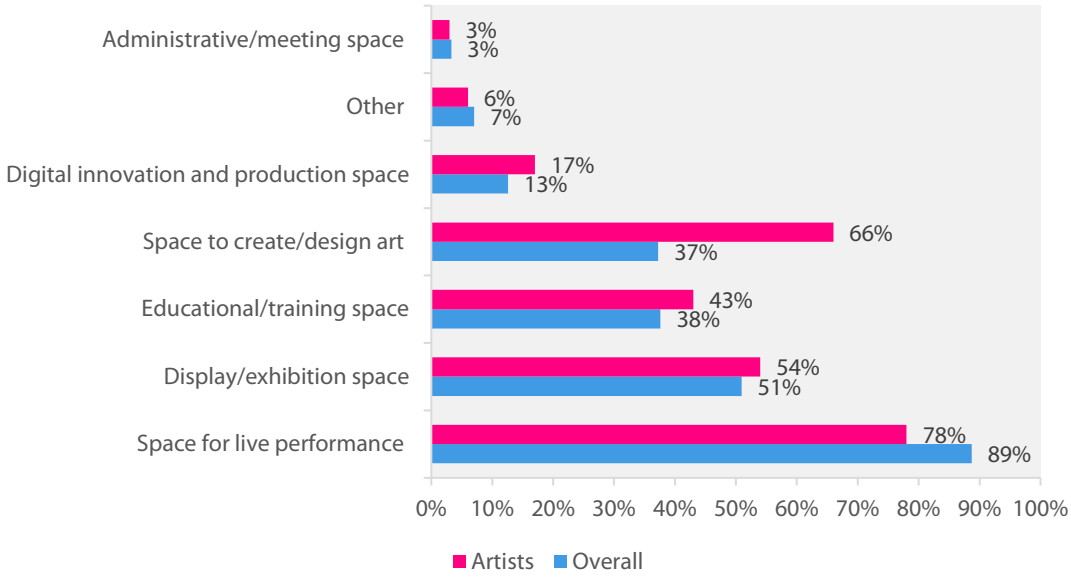


n=81
Source: Collingwood Arts Centre Feasibility Study survey by Nordicity, 2021

- 41% indicated that there is no suitable space in Collingwood and nearly a quarter noted they get more business from outside of the Town (21%).
- "Other" responses included that "sound quality of existing spaces is not up to high musical standards", "more collaborative artists live outside of Collingwood", and "the nature of their programming requires touring."

The chart below compares the types of creative and cultural facilities most desired by survey respondents. Responses from those who are not cultural workers per se are shown in blue, while the arts sector respondents are displayed in pink.

Figure 6: Facilities survey respondents would like to see more of in future



n=1635 (Overall), 618 (Artists)
Source: Collingwood Arts Centre Feasibility Study survey by Nordicity, 2021

- There is strong alignment between the public and artists desires for new facilities, with "space for live performance (e.g., live music, theatre, variety etc.)" taking the greatest share at 89% and 78% respectively.
- The arts and culture sector is also seeking "more space to create and design art" (66%), and "display/exhibition space" (51%) as well educational/training space (43%).
- Other responses included: outdoor performance space, combined maker and sales spaces, and cinema facilities.

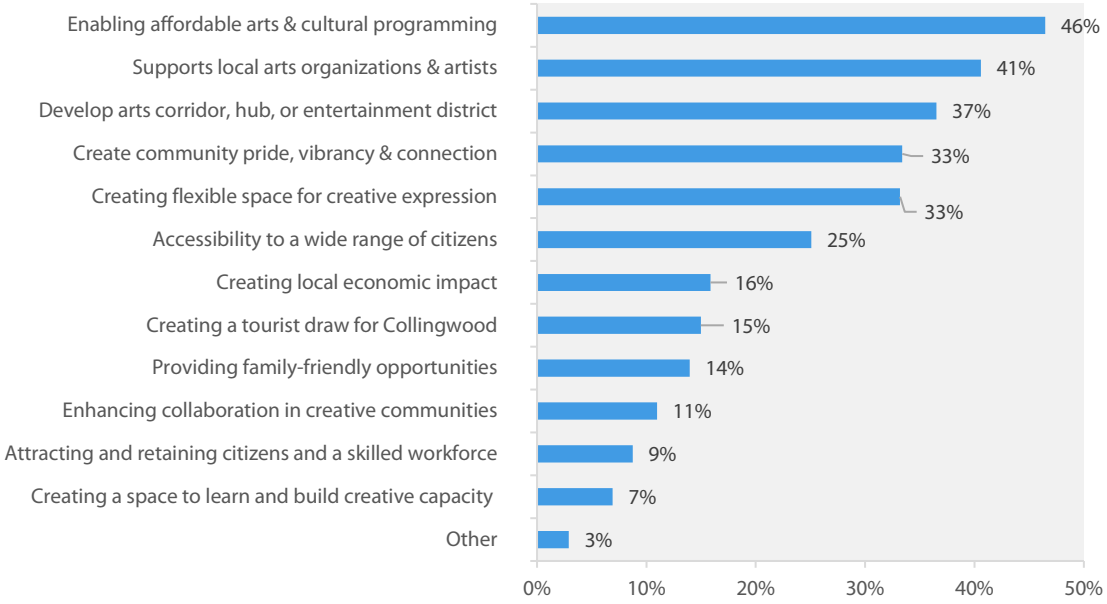
Consultations found there to be a **slight disconnect between the desires and needs of different members of Collingwood's arts, culture, and creative communities.** Those in the **visual arts, theatre, and performing arts sectors** see the potential for an arts centre to **promote local cultural development.** Most of these stakeholders expressed a desire for a space that is accessible to the local community and offers opportunities for artistic experimentation and collaboration between local artists. Affordability was also a concern for local artists and residents alike, explaining that, for the space to truly be accessible, artists need to be able to afford to use it. One survey respondent shared "*I would like to propose [an] arts facility to be directed at the local community rather than for tourists. There is less and less available for those that already live here with lower incomes.*"

Meanwhile, stakeholders in the **creative sectors such as music and digital media production** expressed a desire for **a world-class space with the potential to host relatively large audiences (e.g., 800+)** and offer high quality infrastructure, serving both the local and tourist community. Digital media producers would like to see the space carry state-of-the-art tech equipment for use by the local community with specific rooms for recording and digital media production. Music stakeholders believe the stage needs to be large enough to accommodate top class acts. Hosting

these acts in Collingwood acts as an economic generator and an engine for local artist exposure. Individuals interviewed from these groups saw such a centre as having the capability to act as a vehicle for local music artists and entrepreneurial development and growth through its operational model and programming.

This active group of culture participants' priorities very much aligned with the feedback provided through culture sector consultations. The priority criteria identified for an arts centre by survey regional survey respondents are presented in the chart below.

Figure 7: Regional residents' priority criteria for arts centre in Collingwood



n=1476
Source: Collingwood Arts Centre Feasibility Study survey by Nordicity, 2021

Priorities identified for an arts and culture centre in Collingwood include:

- Enabling affordable arts and cultural programming for the public (46%);
- Supporting local arts organizations and artists (41%);
- Developing an arts corridor, hub or entertainment district (37%);
- Creating flexible space for creative expression (33%); and,
- Creating a sense of community pride, vibrancy and connection (33%).

2.2 Collingwood Arts and Culture Sector SWOT Analysis Overview

The table below presents some of the highlights of a SWOT (Strengths, Weakness, Opportunities and Threats) Analysis of Collingwood's Arts and Culture Sector's needs – particularly related to space, growth and audience attraction.

Typically, strengths and weaknesses relate to the "internal" conditions, i.e., what exists now in Collingwood as far as the population demographics, the arts and culture sector and its facilities.

Table 1: Collingwood Strengths and Weaknesses re: a new Arts and Culture Centre

Strengths	Weaknesses
▪ **Population growing faster than the province:** attracting families and affluent seniors. Part of the Greater Golden Horseshoe growth strategy. ▪ **Established arts and entertainment district** in Creative Simcoe Street featuring and linking sector strengths for enjoyment of locals and visitors. ▪ **Vibrant year-round tourism** – proximity to Blue Mountain, Grey County receives over 2.7 million visitors per year (not including US & Overseas) ▪ **Functions as the major commercial centre** serving an overall trade area of approximately 75,000 people. ▪ **Dynamic people, leaders, arts organizations and institutions,** incl. Creative Simcoe Street, CACE, Rick and Anke Lex, BMFA, The Foundry, Route 26 and many, many more ▪ **Supportive and entrepreneurial sector -** utilizing alternative venues (churches, restaurants, offices, garages), established artists sponsoring/ mentoring young talent ▪ **Broad range of arts and culture strengths** – festivals, music, performing arts, visual arts, community arts, creative digital media etc. ▪ **Various community endorsements sought out by CACE** – government, local stakeholders, Indigenous Leaders and others ▪ **Engaged and committed public** – high survey turnout, **94% of Collingwood-based respondents support the development of an arts centre in Collingwood if proven to be feasible** ▪ Arts sector stakeholders reported satisfaction with Collingwood's facilities for: **Affordability, Safety, and Location**	Collingwood Arts and Culture Sector Least Satisfied with **Collingwood Facilities and Venues** around: ▪ **Lack of Available/Suitable spaces** ▪ **Lack of Flexibility** - challenging to work with, not conducive to creative or collaborative use ▪ **Lack of Accessibility** – venues do not meet AODA or Union codes for people with accessibility challenges (performers or audience members) ▪ **Lack of Capacity** - Not large enough to host 500 people at a time, also a lack of education and meeting space ▪ **Technically Undesirable** - No lighting, poor acoustics, poor condition/usability of equipment ▪ **Missing Amenities / Equipment Lacking** - green room, dressing rooms, rehearsal space, film studio, backstage/wing spaces. ▪ **Demand for meeting and education space unmet** (e.g., Probus)

Turning to opportunities and threats, the following table provides an at-a-glance summary of some of the external opportunities and threats as they relate to the feasibility of a performing arts centre in Collingwood.

Table 2: Collingwood Opportunities and Threats re: a new Arts and Culture Centre

Opportunities	Threats
A new performing arts space would allow the local sector (arts and tourism) to: ▪ **Showcase Collingwood arts and culture to a broader audience** –tourism, packages, Blue Mountain and other festival tie-ins/links ▪ **Pursue ambitious growth plans** – some organizations on cusp of growth, expanding into producing, accessing grants they can't currently access. ▪ **Attract international talent and grow market and awareness** ▪ **Access more professional space for rehearsal and performance** ▪ **Could offer classes/education in a facility that includes** multipurpose media rooms – scale up local educational offering ▪ **Access a venue for greater collaboration amongst artists** building on existing strengths and networks ▪ **Explore new business model opportunities:** integrate social enterprise principles for accessibility and affordability	▪ Collingwood audiences potentially **trained to expect a lower ticket price** ▪ **No post-secondary institution** connection to anchor as hub ▪ **Challenge to attract families with young children to attend the theatre** - summer camp and dance/theatre schools, graduations aside ▪ **Reliance on regional population for viability,** cannot rest on local audiences or local arts sector rentals alone ▪ **Could drive up the cost** of producing / presenting / consuming arts and culture in Collingwood – working against community accessibility. ▪ **Changing consumer behaviours around live events** - even pre COVID-19 (i.e., Netflix impact). ▪ **Losing or stifling existing arts organizations due to inadequate space - limiting their success** ("Not having this space is having a negative impact on potential of the sector and the Town") - **current facilities not maximizing potential tourist/regional audience draw** ▪ **Backlash from community** (as faced in Barrie) were the Town of Collingwood *not* to go ahead with an investment ▪ **Economics:** Virtually no Ontario or Canadian Performing Arts Centre (PAC) is operating without a municipal subsidy

3. Features of an Arts and Culture Centre for Collingwood

In Sections 1 and 2, the project team summarized the broad vision and principles for an arts and culture centre, based on consultations with the local community and arts and culture stakeholders. In this section we convert that broad vision into more tangible features and attributes. As mentioned,

- The original scope of work was to look broadly at an arts and culture centre feasibility – with openness as to features, focus, location etc.
- The lack of adequate venues for performance and rehearsal quickly emerged as the leading facility gap for the sector.
- To attract a bigger chunk of the disposable income dollar, there are "must have" amenities from quality to flexibility to state-of-the-art performance facilities and more.
- There are different views on what it will take to attract name acts, including the optimal size/capacity. The smaller the venue, the less potential to lure a certain tier of act unless for a very special/occasional event or draw.
- In terms of vision – there is tension in the balance between a state-of-the-art facility that programs entertainment as well as arts, and questions as to whether this facility can be truly accessible to the community in terms of audiences and organizations that would program and perform there.

As described, Nordicity and Giaimo have triangulated the vision and key features of a performing arts centre in Collingwood to a shortlist of options each requiring further exploration. The options are mainly differentiated by scale, business model realities and accessibility. Each one is ambitious in its own way. The options include:

1. **A ~400-600 Seat Performing Arts Centre animated primarily (70-80%) by community-driven activity and 30% "tour"-based** (but with the touring share subsidizing much of the community rentals).
2. **An ~800 Seat Performing Arts Centre that adopts closer to a 50:50 split between community-driven activity and more commercial tours** (and where community usage is also supported and subsidized).

As mentioned, the project team assessed that a new venue with fewer than 400 seats would not meet the sector's current or future needs (in which some stakeholders already exceed 400 seat capacity venues). However, new performing arts centres often have a large and a small stage, the latter being more accessible to local arts organizations who may struggle to fill the larger venue (even with clever curtaining and other flexible seating approaches). In either scenario above, but *particularly* for the larger scale option, it could be advantageous and in keeping with the community's interests, to support **a renovation of the Simcoe Street Theatre**. The theatre would remain Collingwood's local black box venue for showcasing emerging and experimental talent and work that requires an intimate setting. This approach would necessitate certain upgrades to Simcoe Street Theatre (e.g., compliance with AODA regulations and an expanded backstage/"green room") instead of including a second stage in the new facility. Having a smaller venue locally can support a more vibrant and successful sector overall by providing an affordable starting point along the venue "continuum."

Indeed, this approach is being adopted in Barrie with regards to the Mady Centre for Performing Arts.[11]

3.1 Desired Features of an Arts and Culture Centre

This is a centre that wants to accomplish a great deal for its community and particularly its arts and culture sector. There are many areas of consensus – including a desire for a professional, well-designed, flexible, sustainable, and accessible facility that builds on the tremendous assets that exist in Collingwood. Still, it is not clear whether the market can support all the "must have" facilities and features. A critical question is always – how many seats? The range in question is not so wide but, given the business model realities, there are risks inherent at any size.

The project team began to develop a MoSCoW analysis, a method to prioritize and understand the features that are deemed:

- M – Must have
- S – Should have
- C – Could have
- W – Won't have

Understanding and agreeing to the "Must Have" and "Should Have" aspects of the facility is critical to the business modelling and scenario planning. As elements of the MoSCoW shift (say promoted or demoted), those changes need to be reflected through the assumptions around square footage and costs. In any case, this MoSCoW is quite high level at this stage but nonetheless provides a foundation for the subsequent estimates.

Table 3: MoSCoW for Collingwood Performing Arts and Culture Centre

Must Have	Should Have
▪ Theatre/Performing Arts stage of professional excellence ▪ Rehearsal Space, Sprung Floor ▪ State-of-the-art Acoustics, Lighting ▪ Fly Gallery ▪ Education and collaboration spaces (to be further defined) ▪ Top quality / premium amenities for artists and backstage space / dressing rooms ▪ Digital media/recording/streaming capacity ▪ Gallery/Display Exhibition space (not a standalone gallery)	▪ Flexibility to adapt seating (e.g., Balcony curtain) ▪ Atrium space for gathering, collaboration call to actions ▪ Events, boardroom/meeting capacity + administrative Space (offices) ▪ Catering facilities for events

[11] "The Mady Centre is still a vital piece of the cultural nodes concept as a venue in the continuum of spaces required by Barrie cultural community. We would recommend that the Mady Centre become a performing arts incubator with all the supports and programs required to make it successful. The Mady should become the launching pad for programming and artists who graduate to the W.A. Fisher as they reach their potential." City of Barrie, "STAFF REPORT ECD017-20" (December 17, 2020).

▪ Restaurant, bar or café – ability to cater events or host catered events ▪ Promoter/manager office ▪ Outdoor space component / garden ▪ Necessary storage	
Could Have	**Will Not Have**
▪ Affordable apartment for artists/tours ▪ Amenities to support potential conference bookings – e.g., meeting rooms, keynote speakers ▪ Retail space / Box office ▪ Digital tools + Silkscreen, glass blowing, 3D printers	▪ "Rec Centre" feel – though accessibility is vital ▪ Casino/gambling

The space would be brought to life by:

- **A theatre** presented by anchor tenants, regional companies and touring presentations (including Comedy, Children's and Family Programming), visiting national and international acts;
- **Music** gigs, tours, festivals and small concerts;
- **Pop-up shows** for visual artists;
- **Education and learning opportunities** e.g., via conferences, talks, PROBUS, community groups, summer theatre camps; and,
- **Technology studio space/control room** to allow for recording of shows for potential streaming/sharing, and with capacity that could appeal to younger demographic, creative industries and artists alike (possible nice-to-have).

3.2 Key Success Factors

In addition to the local consultations, interviews, roundtables and site tours, the project team reviewed the emerging Arts and Culture Centre vision with external stakeholders – representing a range of sectors from live entertainment, music and performing arts - to gain their reactions and solicit early feedback. Interviews included facility operators, Theatre Directors, Industry Associations, Ticketing Platforms, Live Presenters and more.

The reactions in these discussions ranged from highly enthusiastic to extreme caution. In this section, recovery from the pandemic aside, the following tangible and intangible elements were deemed key success factors and would require the Town's leadership in many cases. One interviewee posited that Collingwood is a perfect fit for Ontario's Music City Strategy and suggests that as the world recovers from the pandemic, the value of life performance will "soar", and Collingwood should be prepared to capitalize on that growth.

3.2.1 Audience Attraction

Appendix A provides a detailed assessment of Collingwood's population growth, market size, demographics, and household spending. Analysis showed **conditions that mainly align with the success factors for cultural facilities.** As mentioned, however, Collingwood's market size does not alone justify developing a major performing arts centre (despite the Town's faster than average

population growth). One theatre operator and executive director described an adage that, at best, one will convert approximately 4% of the permanent resident population into annual subscribers for a theatre. Based on just the Town of Collingwood's 2016 population, that share would result in approximately **900 annual ticket subscribers**. That share would grow as Collingwood grows but remains a small base as far as the most highly engaged performing arts consumers. That said, most interviewees support the notion that the "local audience" draw can be located within roughly an hour's drive of the venue. Some even suggested that the further you are from the GTA, the higher that driving time tolerance becomes.

Several interviewees, both local and external to Collingwood, described the challenges of attracting a younger demographic to the theatre specifically. Young families are time- and often cash-starved. Anecdotally speaking, a night out for a show is not a frequent event. Such segments of the population may be more attracted to the educational potential at the space – whether through graduation ceremonies or children's performances though summer camps and so on.

In this reality, the centre would necessarily rely on attracting regional residents, visitors, and tourists as audience members to succeed. Think young couples and friends, affluent seniors, visitors, and tourists seeking a night out on their trip to Blue Mountain Resort. Blue Mountain Resort has stated Live Music as one of its priority pillars and tends to support initiatives that aim to extend the draw for visitors beyond the core winter and summer months (i.e., into shoulder months).

One interview described the potential "VIP" experience the centre might provide both to audiences and the artists performing – the chance to enjoy a show in a relatively intimate, state-of-the-art venue in one of the most beautiful settings in Ontario. This requirement puts a heavy onus on the promoter at the helm of the facility. The centre would need to be run by someone who is willing to deeply connect with local community and heavily market the centre externally - someone who "understands it all", not just a single niche from music to theatre to festivals and municipal demands.

3.2.2 Artist Attraction

Several interviewees described the artist's experience is a growing factor in booking acts, developing a niche via word of mouth and encouraging return booking. One interviewee wondered if Collingwood, through this venue and other initiatives, could show performing artists and productions an incredible experience and make the Town's hospitality a differentiator between this venue and other tertiary markets. They encouraged thinking about the artist's experience "from start to finish, provide all the premium amenities Collingwood can offer" to support an easier sell. Still, as with attracting audiences, the work of marketing the facility will be unrelenting, particularly before it has an established record. The manager or promoter will have to actively sell what is unique about the space that makes it worth the trip to Collingwood, nurture relationships locally, regionally, and beyond and be comfortable in a range of settings, with performing arts, live music, festivals, artists, municipalities and so on.

Regardless of capacity, this facility could be a "venue ladder" for local artist development. Emerging acts could be supported and subsidized to access a bigger stage (particular in the early years while the venue works to attract more established performers) as "opening acts." The Centre might even consider adopting a performance incubator model, encouraging innovation in the art form as well as artist development (e.g., The Theatre Centre in Toronto model). Again, should the investment include an upgrade for the Simcoe Street Theatre, that venue could remain the home of experimental and emerging work.

For the local performing arts groups, festivals and schools, the centre would create the possibility of producing more shows in house, bringing in more international talent to perform, generally accessing more professional space for rehearsal and performance, scaling education and teaching opportunities.

Collingwood has access to a year-round tourism audience that many municipalities lack while also being accessible to the Greater Toronto Area. Creative booking approaches such as block booking acts, "run out" acts, and co-productions with regional festivals would be essential. In early years, performers may be more "C" and "B" – level acts but eventually the centre could attract "A" acts (though cost of A acts may always be prohibitive).

3.3 Local Programming and Sector Engagement

All stakeholders agreed that the facility would need to be the pride of the local community. One interviewee reflected that for this facility to be a success, one cannot neglect the local arts stakeholders in favour of sole focus on the touring and/or international acts. Many interviewees cautioned that as costs grow, the local artistic community can occasionally be forgotten/left behind in favour of higher paying clients. The facility must align with Town priorities and planning and resonate with the local sector stakeholders.

One facility operator recommended conducting a "hard assessment" of the local community's capacity to determine, "What is their capability to use this facility?". They emphasized that the local sector needs to understand how this facility supports their growth aspirations and success. Many local organizations may be shocked to see the cost of renting the venue, for example. Interviewees recommended investing in gaining local sector buy-in early to help them embrace the vision and potential of the centre and to encourage them to target 40-50% growth in their own ticket prices and audience sizes instead of, for example, 10% growth.

4. Size & Location Considerations

In this section, size and location considerations are presented based on the MoSCoW analysis and emerging scale options.

4.1 Size and Scale

Based on section 3.2, two key options have emerged: a medium scale (400-600 seats) arts centre or large-scale (800+ seats) arts centre, both with varying programming identified as per section 3.1 Desired Features. An approximate square footage has been determined for these two options, based on precedent studies of similar centres, building code requirements and standard space requirements for each feature.

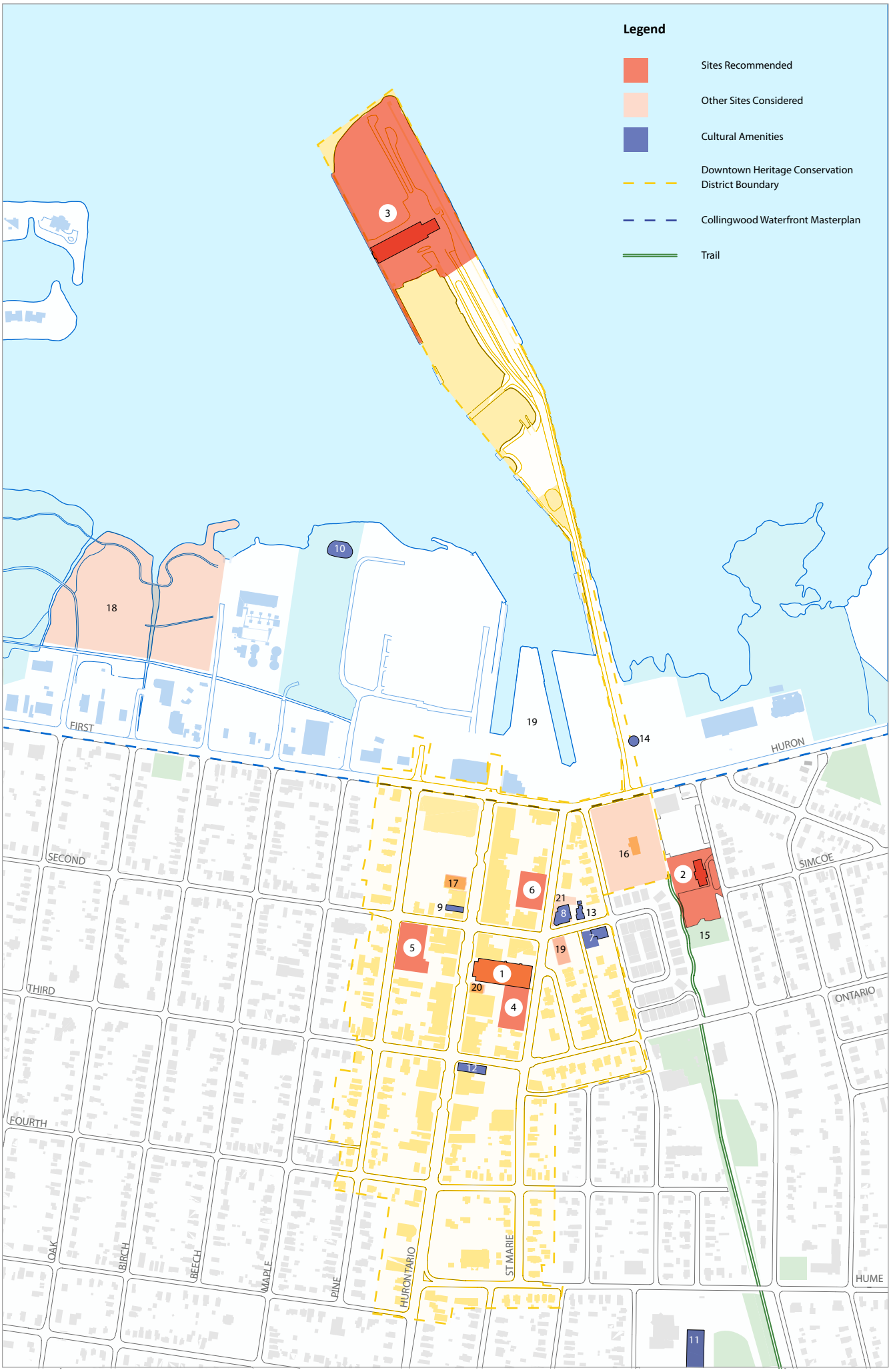
400-600 Seat Arts Centre Option:	37,951 sq. ft.-45,301 sq. ft.
Programming	**Sq. Ft.**
"Must Have" Spaces	37,951
Public Gathering Areas	3,887
Front-of-House	2,200
Theatre (400-600 capacity)	7,768
Administration	1,230
Theatre Support Spaces	4,200
Studios/Classrooms	5,070
Services/Circulation	13,596
+ "Should Have" Spaces	41,001
Outdoor component	2,250
Additional office and catering	800
+ "Could Have" Spaces	45,301
Additional gallery and studios	1,500
Retail and market space	2,200
Apartment for artists	600

800 Seat Arts Centre Option:	75,914 sq. ft.-83,964 sq. ft.
Programming	**Sq. Ft.**
"Must Have" Spaces	7,5914
Public Gathering Areas	13,843
Front-of-House	2,800
Theatre (800+ capacity)	14,730
Administration	1,505
Theatre Support Spaces	8,600
Studios/Classrooms	7,370
Services/Circulation	27,066
+ "Should Have" Spaces	79,264
Outdoor component	2,250
Additional office and catering	1,100
+ "Could Have" Spaces	83,964
Additional gallery and studios	1,000
Retail and market space	2,700
Apartment for artists	1,000

A detailed breakdown of the size analysis and square feet (sq. ft.) assumptions used for the programming can be found in Appendix D.

4.2 Location Analysis

The location analysis recommends that the Downtown and Waterfront area of Collingwood is most suitable for a new Arts and Culture Centre. The location analysis map showcases various considerations that have led to this recommendation. In particular, a cluster of cultural amenities located within or near the Downtown Heritage Conservation District, as well as the projected growth and development outlined in the Collingwood Waterfront Master Plan, indicate an opportunity for an Arts District within the downtown waterfront area that could serve both local community needs and visitors. A number of sites were considered within the Downtown and Waterfront area and further assessed as part of the Study process. While not all sites considered and assessed were deemed suitable for recommendation, there are a number of sites that meet the needs of the Study on a high level and are thus recommended for further consideration, as presented in the map below.



Sites Recommended

1. Eddie Bush Arena + Parking Lot
2. Leisure Time Club
3. Millenium Park / Grain Terminal
4. 140 Ste Marie St. Parking Lot
5. Pine x Second Parking Lot
6. 48 Ste Marie St. Parking Lot

Cultural Amenities

7. Tremont Studios and Square
8. Simcoe Street Theatre
9. Collingwood Foundry
10. Shipyard Ampitheatre
11. Curling Club Lounge
12. Historic Gayety Theatre
13. Collingwood Art School & Studio Galleries
14. Interpretive Panel - Walk of History
15. Friendship Gardens

Other Sites Considered

16. Collingwood Museum Area
17. Federal Building
18. Harbourview Park
19. Public Library
20. Business Development Centre
21. Tremont Studios & Parking Lot

Regardless of which scale, large or medium, is selected for the Arts Centre, a key component is establishing the Centre within an Arts District. Doing so allows for the existing community to benefit directly from the Centre, forming a relationship between spaces that build off of each other and support local needs as well as the potential for further growth. It also ensures that visitors and tourists seeking out the Centre will be easily exposed to many other arts and culture amenities, and vice versa. Collingwood already has a well-established cultural and arts community, with many facilities located within the Downtown. "Creative Simcoe Street" has been identified by the local community as an arts and entertainment district. It is home to over 30 independent and artistic businesses – including 18 artists' studios, a black box theatre, a dance studio, an art supply store and arts school, an arts foundation, fine crafts and gifts, several galleries, and restaurants. The location analysis also aligns closely with the borders of the Downtown Heritage Conservation District (HCD). Whether new construction or a reimagined existing building, the Arts and Culture Centre has the opportunity to leverage the cultural heritage value of downtown Collingwood.

Long-term considerations also recognize that Collingwood's growth will continue, with a significant waterfront community under development as per the Collingwood Waterfront Master Plan. Both the Waterfront and Downtown play an integral role in the Town's identity, and as such it has been determined that the Arts Centre should be located within the Downtown and Waterfront areas of Collingwood. An Arts Centre within the Downtown and Waterfront would also align with the Collingwood Official Plan Sustainable Development Discussion paper (July 2020), which identify the desire to increase use of active transportation and reduce parking standards through the development of complete communities.

Further to the recommendations that the Arts Centre be located within the Downtown and Waterfront, several sites have been identified and assessed in terms of the site feasibility in relation to the sq. ft. requirements determined in section 4.1. Below is a list of potential sites that are recommended for further investigation into an Arts Centre:

Eddie Bush Arena

Images: Interior ceiling of Eddie Bush Arena (left); view of exterior from Collingwood Public Library (right).

- Status: Currently in use as an arena. The availability of this site is dependent on the development of a new Multi-Use Recreation Facility (MURF).
- Location: 96 Hurontario Street. Within Downtown HCD. Short walking distance from Creative Simcoe Street (less than 100m). Supports active transportation.
- Size: Both Option 1 and 2 are feasible on this site.
- Suggested Building Type: Option 1 is feasible through adaptive re-use of the existing building. Option 2 would require adaptive re-use of the existing building, plus a new addition either above the existing building or directly south into the adjacent parking lot.

- Other notes: The cultural value of this site is another significant benefit. The interior exposed wood ceiling reflects Collingwood's ship building history, while the site itself was once an opera house and today is attached to Town Hall.

Leisure Time Club

Images: Leisure Time Club exterior and parking lot (left); Friendship Garden adjacent to Club (right).

- Status: The site is currently home to the Leisure Time Club, a non-profit dedicated to providing programming for Seniors. Any change to this site requires funding for existing Leisure Club activities to be supported and re-housed in another location meeting the Leisure Time Club's needs.
- Location: 100 Minnesota Street. Outside of Downtown HCD. Medium walking distance from Creative Simcoe Street (500m), adjacent to the Collingwood Museum, however it is visually segregated from the Downtown with limited site-lines. One side is facing a residential area. Supports active transportation.
- Size: Both Option 1 and 2 are feasible on this site. Significant space available. Adjacent to Friendship Garden Park, providing additional space for outdoor programming.
- Suggested Building Type: New construction.
- Other notes: The site itself has limited cultural value or visual presence in the current context. However, it is directly adjacent to both the Friendship Garden Park and Collingwood Museum. There is an opportunity to form relationships with these adjacent cultural and recreational amenities, such as through an extension of the Collingwood Museum grounds into this site, that could establish a new destination in Collingwood near the already well developed Downtown, supporting the anticipated long-term growth and needs of the Town.

Millennium Park / Grain Terminal

Images: Space south of the Grain Terminals (left); parking lot north of the Grain Terminals and adjacent to Millennium Park (right).

- Status: Millennium Park is a popular outdoor waterfront destination and essential public space. The Grain Terminals are unoccupied. The land directly north of the Terminals is identified as "event staging and concert areas" in the Collingwood Waterfront Master Plan (2016) which aligns with the use of an Arts Centre with outdoor space.
- Location: 1-45 Heritage Drive. Space directly north or south of the Grain Terminals. Within Downtown HCD, however considered far walking distance (over 1km from Creative Simcoe Street).
- Size: Both Option 1 and 2 are feasible on this site, however Option 2 would take away space from the Park. Would need to ensure that ample public park space remains on the site.
- Suggested Building Type: New construction directly adjacent or attached to the Grain Terminals. Adaptive re-use of the Grain Terminals into an Arts Centre is not recommended due to complexities. Significant Park space should remain.
- Other notes: The cultural value of this site is another significant benefit. Being adjacent to both the waterfront and the landmark Grain Terminal would allow for the creation of an iconic destination in Collingwood.

Parking Lots

Images: 140 Ste Marie Street parking lot beside Eddie Bush Arena (left); parking lot at Pine Street & Second Street (middle); 48 Ste Marie Street parking lot across from Simcoe Street Theatre (right).

- Status: Currently used as parking lots with no future development plans.
- Location: Multiple parking lots identified and owned by Town: 140 Ste Marie Street, 48 Ste Marie Street, Pine Street & Second Street. Short walking distance (less than 300m from Creative Simcoe Street).
- Size: Both Option 1 and 2 are feasible on these sites.
- Suggested Building Type: New construction.
- Other notes: Parking lots offer significant opportunity for intensification in growing Towns, especially since they avoid demolition of existing buildings that result in social and environmental negative impacts. However, an Arts Centre would require significant parking accommodations that must be considered in further study for all sites. Developing a parking lot would reduce the existing parking available in Downtown and alternative solutions for parking would need to be established.

Given that further study is required to determine a feasible concept design for each site, multiple sites have been recommended for their potential. This ensures that there are ample opportunities for the development of an Arts Centre even if further study determines one of these specific sites is not ideal.

In addition to these sites, Simcoe Street Theatre has been identified as a key anchor within the Arts District with the potential to expand. One approach to achieving the programming and space requirements identified in section 4.1 would be for the City to support a renovation of the Simcoe Street Theatre that could offer a portion of the programming, while also building a new Arts Centre that meets the remaining desired features and community needs.

A comprehensive list of sites considered can be found in Appendix E.

4.3 Design Guidelines

Section 4.2 identified sites and an area that closely aligns with the Downtown Heritage Conservation District (HDC). The new Arts Centre will therefor need to balance the HCD requirements, integrate into the existing character, and support the cultural value of the Downtown, while also allowing for the development of a state-of-the-art performance facility as identified in section 3.1 Desired Features. There is potential for various building types for the identified sites: adaptive re-use, renovation, new construction, each with various benefits depending on the final site selected. Regardless of the building type pursued or the size option selected, the Centre should align with the following Design Guidelines:

Contemporary & Quality Design

Images: Isabel Bader Centre for Performing Arts, Kingston, ON, precedent showing contemporary design excellence integrated into historic site (top); Nevill Holt Opera, Leicestershire, UK, theatre space precedent (left); Janet Wallace Fine Arts Centre, St. Paul, MN, flexible studio space precedent (right).

- Architectural elements should have careful detailing, consistency in material and design, and be of high quality to contribute to the rich visual composition of Downtown and Waterfront Collingwood.
- Regardless of scale, design excellence should be pursued to support the desire to create a landmark destination, with particular emphasis on the need to meet best practice design standards for the performance spaces, theatre, and gallery.
- The design should be sympathetic to the heritage and existing context of Collingwood yet allow for a clear and distinct reading of the new building. A contemporary interpretations of traditional building styles and architectural features is encouraged rather than replication of historical styles.
- Consider solar access and shadows on open spaces, interior courtyards and the public realm when arranging and orienting the Arts Centre, as well as when orienting the building to leverage wind and thermal comfort and lighting requirements.
- Materials shall be selected for their quality, durability and visual compatibility with adjoining buildings and the public realm. Utilize cladding materials that are traditionally found in Collingwood including natural materials, brick, stone, metal, wood, glass and concrete.
- Establish a sense of place, creatively expressing the history, landscape, and identity of Collingwood. Leverage the integration of architecture, landscape architecture, interior design, signage and wayfinding, public art, and other design components to create a visual anchor and a place of community gathering and activity.
- Provide opportunities for temporary and permanent integrated public art, both within the Centre as well as in the public realm and landscape.

Context & Character

Existing buildings in Collingwood Downtown HCD

Future buildings and public realm design identified in the Collingwood Waterfront Master Plan

- Ensure the design is context-specific and of appropriate scale and massing to the adjacent and surrounding built environment.
- The interior and exterior should provide a welcoming atmosphere, as well as accessible and inclusive spaces such as universal washrooms and ample pedestrian pathways.
- Massing, scale, and other architectural details should be complementary to guidelines contained in the Downtown Heritage Conservation District.
- The building should be oriented to address public spaces, including streets, sidewalks, parks, natural areas and trail, and/or the waterfront. Blank facades should be avoided on these public facing frontages.

Social, Economic, and Environmental Sustainability

Daniels Spectrum, Toronto, ON, precedent showing social-enterprise café operated by Dixon Hall Neighbourhood Services (left). Stockholm, Sweden, precedent showing ample bike storage and green roof (right).

MASS MoCA, North Adams, MA, precedent showing adaptive re-use flexible open arts space (left); SHED, Healdsburg, CA, precedent for new construction flexible open indoor and outdoor space.

- The design shall support both social and economic sustainability for the local Collingwood community, considering diverse user needs, as well as accessibility and inclusivity. As a community anchor, it is encouraged that the design aim to not only meet but also exceed AODA standards.
- Where possible, allow for the creation of flexible, versatile, and adaptable spaces, prioritizing durability and resilience so that the centre is long-lasting and can respond to changing demographics and evolving community needs.
- Aim to achieve best practices and standards in environmentally sustainable architectural design, such as WELL, LEED, Passive House.
- Incorporate sustainability measures into building design, such as low-energy appliances, local materials, solar panels, green roofs, and low-flow plumbing equipment. Re-using existing buildings, materials, and resources is encouraged, as is consideration to the long-term maintenance needs of the building.
- Support active transportation by providing bike parking that is conveniently located, well-lit, and highly visible.
- Where environmental sustainability measures are implemented, consider integrating educational signage to raise awareness and knowledge among the community.

Landscape and Public Realm

Winters Theatre, Glencoe, IL, precedent showing public realm, lighting, and landscape architecture at entrance of theatre building

Precedent showing low-impact landscape architecture with rain garden and education signage (right).

- Landscape architecture and the public realm shall be given equal consideration as the design of the building, integrating with the overall architecture and design of the site.
- The public realm shall be designed to support the Arts Centre as a landmark and destination within Collingwood.
- Incorporate low-impact development techniques to help in managing stormwater on-site, especially to offset required parking.

Native plant materials shall be used wherever possible as they require less maintenance, watering, and fertilization.

5. Business Modelling, Financial Scenarios

In this section, Nordicity introduces financial models based on the scenarios examined for a cultural centre in Collingwood (see Section 4).

Scenario 1. A medium-scale, 400 seat cultural centre, covering a total surface area of 45,000 square feet, with 23,500 square-feet dedicated to performing arts.

Scenario 2. A large-scale, 800-seat cultural centre, covering a total surface area of 85,000 square feet, with 48,000 square-feet dedicated to performing arts.

Note to Reader

Throughout this section of the report, readers will note that Option 1 is presented and costed as a 400-seat theatre rather than a 400-600 seat theatre. By doing so, the financial scenarios are deliberately and more clearly differentiated between the two poles on the spectrum of feasible seating capacity.

For each scenario, this section presents:

- An overview of the **construction costs**, taking into consideration two levels of architectural excellence (*Low* and *High*). For every type of space (e.g., office, performing arts facility), ranges of industry standard cost per square-foot were sourced from Altus Group's *2021 Cost Canadian Guide* and adjusted with comparable facilities.
  For the business modelling exercise, the costs illustrate the low end of these range: in both scenarios, the model considers the minimum, bare-bones end of these ranges.
  For instance, a scenario 1 comparable facility with *Low* construction costs would be the Hamilton Family Theatre in Cambridge, ON. Built in 2013, the 59,000 sq. ft., 500-seat facility costed an estimated $14 million. At the other end of the spectrum, a scenario 2 comparable facility with *High* construction costs would be the Isabel Bader Centre in Kingston, ON. The facility was built in 2014 for a total $72 million and can accommodate 566 patrons in the theatre for a total 80,000 square feet.

On the left: Hamilton Family Theatre, Cambridge. On the right, Isabel Bader Centre in Kingston.

  It must nevertheless be noted that the price per square-foot does not go below $400 for all spaces. Over the last few years construction and material costs have gone up significantly - especially due to pandemic - and it seems unlikely that these prices will go back down even after pandemic.

- A forecast of the **annual programming**, by type of event, for years 1 to 5.
- Drawing upon this forecast, a detailed description of the **net income by type of event**.

- An **income statement** for years 1 to 5. As mentioned above, the financial model reflects the lowest cost version of each size of facility.

Finally, Section 5.3 compares the two scenarios and focuses on **cash flow**, required **investment**, and key **outputs**.

5.1 Scenario 1: 400-seat venue

Description

This table briefly expands on the detail provided in Section 4.1, with cost estimates for the construction of a 45,000 square-foot, 400-seat venue.[12]

Depending on the level of architectural excellence selected (as described above), this facility could require a $16 million to $25 million initial investment.

Table 4: Construction Costs – Scenario 1

Requirement	Area	Space	Cost assumption	
			Low	High
Must Have	**Performing Arts Facility** *400-seat theatre, Rehearsal Space, Education Space, Art Gallery, Control Room, Sound & Light, Café, Lobby & Box Office, Green Room, Dressing Room & Wardrobe*	23,500 sq. ft.	$11,870,000	$18,560,000
	Office and Service Space *Offices & Board Room, Storage, Washrooms, Circulation, Electrical & Mechanical, Structure & Build-up*	15,000 sq. ft.	$3,160,000	$4,580,000
	Total	**38,500 sq. ft.**	**$15,020,000**	**$23,150,000**
Should Have Could Have	**Additional Spaces** *Catering Facilities, Additional Flex Office Space* *Outdoor Space, Retail, Apartment for Artists, Arts & Crafts Studio*	6,600 sq. ft.	$1,390,000	$2,010,000
Grand Total		**45,100 sq. ft.**	**$16,410,000**	**$25,160,000**

Source: Nordicity and Giaimo research, comparable facilities, Altus Group
Totals may not add up due to rounding.

[12] Again, in this scenario, 400 seats would be the minimum capacity threshold in a range between 400-600 seats.

For more information, please refer to Appendix D.

Concert Hall and Event

The table below describes the distribution of events (both concert hall events and room rentals) anticipated for the first five years of operation of the cultural centre.

It is understood that the cultural centre would be home to the following type of events:

- **Ticketed:** shows presented by large (relatively-speaking), commercial organizations (e.g., a Live Nation concert, a touring show, comedy etc.). This type of event would take place in the performing arts facility (including control room, sound and light, dressing room, wardrobe, etc.), with access to the concession stand/bar and lobby.
- **Community**: shows presented by local independent arts and culture organizations (e.g., Theatre Collingwood performance). This type of event would take place in the performing arts facility (including control room, sound and light, dressing room, wardrobe, etc.), with access to the concession stand/bar and lobby. This type of event would pay a lower rental fee and production staff would be more limited than a full commercial production.
- **Rehearsal**: space rented by organization to prepare and rehearse shows. This type of events would take place in the dedicated rehearsal space.
- **Classroom**: rooms rented for meetings and educational events. This type of events would take place in the dedicated education space and/or meeting rooms.
- **Events**: space reserved for large receptions, weddings, parties. For these events, patrons would have access to the lobby and café, and outdoor space.

Table 5: Annual Programming (days) – Scenario 1

Type of Event	Year 1	Year 2	Year 3	Year 4	Year 5
Ticketed	13	35	45	50	56
Community	120	125	128	129	130
Concert hall total	***133***	***160***	***173***	***179***	***186***
Rehearsal	111	111	111	111	111
Classroom	100	150	150	150	200
Events	52	78	91	98	104
Room rental total	***263***	***339***	***352***	***359***	***415***

Source: Nordicity research, comparable facilities, stakeholder interviews, CACE

This fill rate was estimated using a set of comparative facilities, supplemented by interview with local stakeholders that showed interest in the creation of this facility and assumptions provided by the Collingwood Arts, Culture and Entertainment (CACE) group. Nordicity took an analytical approach, with estimate rentals based on validated CACE estimates, adjusted to reflect results of Nordicity interviews and Nordicity assessment of likely utilization based on facility specs. (e.g., the 800-seat facility would see less use from small local renters due to higher cost, and inability to fill the larger hall to a comfortable level – see scenario 2)

In particular, *Ticketed* events would grow from 12% of the concert hall programming to 30% of the performances from Year 1 to 5. As such, the scenario 1 facility focuses on community programming

and offers a more accessible yet state-of-the-art venue to local independent organizations. By Year 5, more than two-thirds of the hall would still remain community rentals.

For more information, please refer to Appendix D.

Financial Forecasts

Financial forecasts consist of two components. First, Nordicity calculated the anticipated net income per event type, as described above. Using this net income, we were able to present a high-level income statement for the first five years of operations of the cultural centre.

Ticketed and *Events* rentals appear to be the most profitable type of events and could balance a programming that features more *Community* performances.

For detailed assumptions, please refer to Appendix D.

Table 6: Net Income per Event – Scenario 1

	Rental ticketed	Rental community	Rental rehearsal	Rental classroom	Rental events
Direct revenues					
Rental fees	$1,000	$300	$150	$150	$300
Production recovery	$1,100	$300	n/a	n/a	n/a
Security and Front of House (FOH) recovery	$825	$750	n/a	n/a	n/a
Total	$2,925	$1,350	$150	$150	$300
Direct expenses					
Production	$1,000	$300	n/a	n/a	n/a
Front of House	$500	$500	n/a	n/a	n/a
Security	$250	$250	n/a	n/a	n/a
Total	$1,750	$1,050	n/a	n/a	n/a
Total	$1,175	$300	$150	$150	$300
Ticket facility fee	$1,125	n/a	n/a	n/a	n/a
Bar and catering					
Revenues	$1,950	$693	n/a	n/a	$6,000
Cost of Goods Sold (COGS)/Labour	- $1,170	- $416	n/a	n/a	- $4,800
Net bar and catering	$780	$277	n/a	n/a	$1,200
Net income per event	**$1,955**	**$577**	**$150**	**$150**	**$1,500**

Source: Nordicity research, comparable facilities, stakeholder interviews, CACE

The following income statement is based on the data presented in Tables 5 and 6.

As more events are programmed - reaching a plateau of 415 annual events – the cultural centre gradually tends toward an annual operating deficit of -$231,000. The model could be made cost neutral with sufficient use by commercial promoters (*Ticketed* rentals), but we understand that this facility should be accessible to community groups as illustrated in Table 5 - which may be stretching budgets, even at the subsidized rate:

- Commercial rate (*Ticketed* rentals): $2,925
- Subsidized rate (*Community* rentals): $1,350 (46% of commercial rate)

Table 7: Income Statement – Scenario 1

	Year 1	Year 2	Year 3	Year 4	Year 5
Net event revenues	$98,917	$140,615	$157,715	$166,265	$182,314
Ancillary event revenues	$106,040	$155,154	$179,710	$191,989	$204,267
Non-event revenues	$150,000	$150,000	$150,000	$150,000	$150,000
Sponsorship	*$100,000*	*$100,000*	*$100,000*	*$100,000*	*$100,000*
Fundraising	*$150,000*	*$150,000*	*$150,000*	*$150,000*	*$150,000*
Total Revenues	$354,957	$445,769	$487,425	$508,253	$536,581
Maintenance	$67,424	$67,424	$67,424	$67,424	$67,424
Utilities	$75,000	$75,000	$75,000	$75,000	$75,000
Non-event security	$100,000	$100,000	$100,000	$100,000	$100,000
Custodial services	$80,000	$80,000	$80,000	$80,000	$80,000
Insurance	$20,000	$20,000	$20,000	$20,000	$20,000
Administration	$250,000	$250,000	$250,000	$250,000	$250,000
Marketing	$150,000	$150,000	$150,000	$150,000	$150,000
Fundraising expense	$25,000	$25,000	$25,000	$25,000	$25,000
Total Expenses	$767,424	$767,424	$767,424	$767,424	$767,424
Net operating income	**- $312,467**	**- $221,655**	**- $179,999**	**- $159,171**	**- $130,843**

Source: Nordicity research, comparable facilities, stakeholder interviews, CACE

More assumptions are provided in Appendix D.

5.2 Scenario 2: 800-seat venue

Description

This table briefly expands on the detail provided in Section 4.1, with cost estimates for the construction of an 85,000 square-foot, 800-seat venue.

Depending on the level of architectural excellence selected (as described in Section 5.1), a large facility could require an initial $32 million to $49 million investment.

Table 8: Construction Costs – Scenario 2

Requirement	Area	Space	Cost assumption	
			Low	High
Must Have	**Performing Arts Facility** *800-seat theatre, Rehearsal Space, Education Space, Art Gallery, Control Room, Sound & Light, Café, Lobby & Box Office, Green Room, Dressing Room & Wardrobe*	47,900 sqft	$24,210,000	$37,880,000
	Office and Service Space *Offices & Board Room, Storage, Washrooms, Circulation, Electrical & Mechanical, Structure & Build-up*	28,900 sqft	$6,070,000	$8,820,000
	Total	**76,800 sqft**	**$40,280,000**	**$46,690,000**
Should Have Could Have	**Additional Spaces** *Catering Facilities, Additional Flex Office Space* *Outdoor Space, Retail, Apartment for Artists, Arts & Crafts Studio*	8,100 sqft	$1,690,000	$2,460,000
Grand Total		**84,900 sqft**	**$31,970,000**	**$49,150,000**

Source: Nordicity research, comparable facilities, Altus Group
Totals may not add up due to rounding.

For more information, please refer to Appendix D.

Concert Hall and Event

Table 9 below describes the distribution of events (both concert hall events and room rentals) anticipated for the first five years of operation of the cultural centre.

Table 9: Annual Programming (days) – Scenario 2

Type of Event	Year 1	Year 2	Year 3	Year 4	Year 5
Ticketed	10	49	69	78	88
Community	90	94	96	97	98
Concert hall total	***100***	***143***	***164***	***175***	***186***
Rehearsal	111	111	111	111	111
Classroom	100	150	175	188	200
Events	52	78	91	98	104
Room rental total	***263***	***339***	***337***	***396***	***415***

Source: Nordicity research, comparable facilities, stakeholder interviews, CACE

As assumed in scenario 1, programming reaches a plateau of 186 concert hall events per year by year 5. However, the distribution of programming differs from scenario 1: community events account for 53% of the concert hall performances in year 5 and onwards (against 80% in scenario 1) as a larger venue would potentially attract more higher-profile, ticketed performances (which then represent 47% of the performance by year 5 in this scenario, against 30% in scenario 1).

Also note that the ramp up in concert hall event is steeper in the first years because we anticipate that there will be more "prime" dates available to book, and the schedule will be more open. An active business development team will have the most success in the first year and decline as they gradually fill up the rest of the calendar. That being said, the key takeaway from the model is year 5 (i.e., the occupancy once the plateau is reached), but this ramp up is a sensible way to fill in the gap between year 1 and year 5.

For more information, please refer to Appendix D.

Financial Forecasts

Financial forecasts consist of two components. First, Nordicity calculated the anticipated **net income per event type**, as described above. Using this net income, we were able to present a **high-level income statement** for the first five years of operations of the cultural centre.

In this second scenario, *Ticketed* rentals also appear to be the most profitable type of events by a large margin.

For detailed assumptions, please refer to Appendix D.

Table 10: Net Income per Event – Scenario 2

	Rental ticketed	Rental community	Rental rehearsal	Rental classroom	Rental events
Direct Revenues					
Rental fees	$1,500	$450	$150	$150	$300
Production recovery	$1,650	$450	n/a	n/a	n/a
Security and Front of House recovery	$1,238	$1,125	n/a	n/a	n/a
Total	$4,388	$2,025	$150	$150	$300
Direct Expenses					
Production	$1,500	$450	n/a	n/a	n/a
Front of House	$750	$750	n/a	n/a	n/a
Security	$375	$375	n/a	n/a	n/a
Total	$2,625	$1,575	n/a	n/a	n/a
Net income per event	$1,175	$300	$150	$150	$300
Ticket facility fee	$1,500	n/a	n/a	n/a	n/a
Bar and catering					
Revenues	$3,900	$693	n/a	n/a	$6,000
Cost of Goods Sold (COGS)/Labour	- $2,340	- $416	n/a	n/a	- $4,800
Net bar and catering	$1,560	$227	n/a	n/a	$1,200
Net income per event	$4,823	$727	$150	$150	$1,500

Source: Nordicity research, comparable facilities, stakeholder interviews, CACE

The following income statement is based on the data presented in Tables 10 and 11.

As more events are programmed - reaching a plateau of 415 annual events – the cultural centre gradually tends toward an annual operating deficit of -$131,000. The model could be made cost neutral with sufficient use by commercial promoters (*Ticketed* rentals), but we understand that this facility should remain accessible to community groups as illustrated in Table 9 - which may be stretching budgets, even at the subsidized rate:

- Commercial rate (*Ticketed* rentals): $2,625
- Subsidized rate (*Community* rentals): $1,575 (60% of commercial rate)

Table 11: Income Statement – Scenario 2

	Year 1	Year 2	Year 3	Year 4	Year 5
Net event revenues	$105,375	$191,289	$234,246	$255,724	$277,203
Ancillary event revenues	$102,930	$196,176	$242,799	$266,110	$289,422
Non-event revenues	$300,000	$300,000	$300,000	$300,000	$300,000
Sponsorship	*$250,000*	*$250,000*	*$250,000*	*$250,000*	*$250,000*
Fundraising	*$150,000*	*$150,000*	*$150,000*	*$150,000*	*$150,000*
Total Revenues	$508,305	$687,465	$777,045	$821,835	$866,624
Maintenance	$134,479	$134,479	$134,479	$134,479	$134,479
Utilities	$112,500	$112,500	$112,500	$112,500	$112,500
Non-event security	$100,000	$100,000	$100,000	$100,000	$100,000
Custodial services	$120,000	$120,000	$120,000	$120,000	$120,000
Insurance	$30,000	$30,000	$30,000	$30,000	$30,000
Administration	$250,000	$250,000	$250,000	$250,000	$250,000
Marketing	$225,000	$225,000	$225,000	$225,000	$225,000
Fundraising expense	$25,000	$25,000	$25,000	$25,000	$25,000
Total Expenses	$996,979	$996,979	$996,979	$996,979	$996,979
Net operating income	**- $388,674**	**- $207,515**	**- $119,935**	**- $75,145**	**- $30,355**

Source: Nordicity research, comparable facilities, stakeholder interviews, CACE

More assumptions are provided in Appendix D.

5.3 Comparison

Building on the two scenarios analysis presented in Sections 5.1 and 5.2, the following table summarizes the cash flow from construction to year 5 of operation for both the 400-seat venue and the 800-seat facility.

Note that this cash flow statement analysis reflect the **lowest infrastructure cost version** of each size of facility (see definition in the introduction of Section 5).

Attention should be paid to the cash flows from financing. Financing can be broken down into two components. First, grants are annually awarded to the cultural centre to cover a portion of operating costs. The larger facility (scenario 2) is likely to be more self-sufficient as it might attract more business from larger, unsubsidized out-of-town promoters: the annual grant is therefore the same as in scenario 1 despite the larger facility and the higher operating costs (as seen in Year 1-5 Financing in Table 12 below).

Second, seed investment brings the initial momentum by supporting the construction of the facility. In this model, seed investment is primarily provided by the Town of Collingwood. Any cost not covered by the municipality would need to be financed through government contributions (e.g., Province of Ontario) or debt. The latter and would come with additional associated costs.

In the models presented in Table 12 below, the seed investment is not supported by debt financing and integrally provided by governments:

- Scenario 1: $16,750,000 seed investment
  - $15,250,000 provided by the municipality
  - $1,500,000 from other levels of government
- Scenario 2: $32,350,000 see investment
  - $31,750,000 provided by the municipality
  - $500,000 from other levels of government

Table 12: Cash Flow Statement Comparison – Scenarios 1 and 2

		Construction	Year 1	Year 2	Year 3	Year 4	Year 5
SCENARIO 1	Operations		- $312,467	- $221,655	- $179,999	- $159,171	- $130,843
	Investment	- $16,408,750					
	Financing	$16,750,000	$250,000	$250,000	$250,000	$250,000	$250,000
	Seed investment	*$16,750,000*					
	Operating grants		*$250,000*	*$250,000*	*$250,000*	*$250,000*	*$250,000*
	Net cash flow	**$341,250**	**- $62,647**	**$28,345**	**$70,001**	**$90,829**	**$119,157**
	Opening balance	$0	$341,250	$278,603	$306,948	$376,949	$467,778
	Closing balance	$341,250	$278,603	$306,948	$376,949	$467,778	$586,935
SCENARIO 2	Operations		- $388,674	- $307,515	- $219,935	- $175,145	- $130,355
	Investment	-$31,971,381					
	Financing	$32,350,000	$250,000	$250,000	$250,000	$250,000	$250,000
	Seed investment	$32,350,000					
	Operating grants		*$250,000*	*$250,000*	*$250,000*	*$250,000*	*$250,000*
	Net cash flow	**$378,619**	**- $138,674**	**- $57,515**	**$30,065**	**$74,855**	**$119,645**
	Opening balance	$0	$378,619	$239,944	$182,429	$212,494	$287,349
	Closing balance	$378,619	$239,944	$182,429	$212,494	$287,349	$406,994

In a glimpse, this final table summarizes the key outputs and assumptions underlying the model presented throughout this Section.

Table 13: Outputs and key assumptions -Scenarios 1 and 2

	Scenario 1 – 400 seats	Scenario 2 – 800 seats
Construction costs		
Low	$16.4 million	$32.0 million
High	$25.2 million	$49.1 million
Annual operating deficit		
By Year 5	- $130,843	- $130,355
Auditorium rentals in Year 5		
Ticketed	56 (30% of programming)	88 (47% of programming)
Community	130 (70% of programming)	98 (53% of programming)
Auxiliary space rentals in Year 5		
Rehearsal	111	111
Classroom	200	200
Events	104	104
Total	415	415
Community event rates		
Auditorium rental rate	$300	$450
Labour cost	$1,050	$1,575
Total cost to renters	$1,350	$2,025
Break-even per-ticket rental cost for community events (use of space only)		
50 attendees	$27.00	$40.50
100 attendees	$13.50	$20.25
200 attendees	$6.75	$10.13
400 attendees	$3.38	$5.06
600 attendees	n/a	$3.38
800 attendees	n/a	$2.53

Note that these break-even calculations relate to the use of the space only and not the costs for presenting and creating the shows.

This table raises two new elements:

- **Community event rates:** the 400 seat cultural centre is a more accessible facility for local independent arts organizations. However, a significant focus on community events as expected in scenario 1 has an impact on the annual operating deficit from year 5 onwards.
- **Break-even cost for community events:** considering the total cost to community renters, the final section of the table presents the ticket price that would allow local organizations to balance their budget. For instance, a community organization that sells 200 tickets at $6.75 for a performance in the scenario 1 facility would repay the cost of the rental. The larger facility in scenario 2 is less accessible for organizations and eventually for the audience: a community organization would need to sell 200 tickets at $10.13 to break even. However, in this scenario, ticket prices can remain affordable if attendance is higher. Moreover, when a community organization expects fewer than 200 tickets to be sold, it could use the smaller theatre (if

available). A second, smaller venue would potentially house events with modest ticket prices and smaller attendance projections.

6. Governance

This feasibility study marks the first step in the planning process to develop an arts and culture centre in Collingwood. As such, it is likely too early to provide recommendations on the optimal governance model structure without first defining the exact function and priorities for the centre itself. The project team instead identified governance models used in different cultural centres and districts internationally to provide alternatives for future consideration.

To achieve a level of sustainability, the centre should have governance arrangements that provide incentives to be successful at the box office; however, given the need to be strongly community-centred, the arts centre will also need to be mandated to make space available – at affordable market rates – to a variety of local users. The team has identified the following governance models for consideration in future development plans.

6.1 Municipality-Owned and Managed

The Collingwood arts and culture centre would be owned and managed by the Town of Collingwood through an advisory board and/or an independent board.

An **advisory board** would be appointed to provide advice and support in areas needed – including, but not limited to, technical expertise, programming insight, fundraising and advocacy support. Advisory boards can also play an important role in maintaining connection to the local arts, culture, and creative community, ensuring their views are reflected in decisions affecting the arts and culture centres' operations.

An **independent board** appointed by the Town would hold more operational responsibility. To create one, the Town would appoint a search committee to recruit a balanced board and chair. They then identify new board members that would ultimately need to be approved and officially appointed by the Town. The board would then operate under a municipal framework that would establish their specific roles, responsibilities, and composition. These boards are generally responsible for the management and operations of the facility.

The strengths and weaknesses of a municipally-owned and managed model are presented in the table below.

Table 14: Pros & Cons of a Municipality-Owned and Managed Model

Pros	Cons
▪ Town retains full control of the space – some of which can be delegated to the independent board at the Town's discretion. ▪ Ensures management and operations of the centre are in line with municipal strategies.	▪ Can limit access to funding from other government sources – e.g., provincial and federal arts councils, funding agencies. ▪ Vulnerable to unforeseen municipal cutbacks

This model is often used in the performing arts sector. Examples of Municipality-owned and managed arts centres include the FirstOntario Performing Arts Centre in St. Catherines, which operates under an independent board model, and the Oakville Centre for the Performing Arts in Oakville, which is owned and managed by the Town of Oakville.

The FirstOntario PAC has a mandate to act as a catalyst for the development of St. Catherines and does so by acting as a presenting, promotions, and fundraising organization. They showcase a variety of performances and gatherings in their space ranging from theatre and dance to film, speaker presentations and community gatherings. The theatre can accommodate 200-800 people and they program 1000 performances a year.

The Oakville PAC has a mandate to provide the public with cultural experiences and foster appreciation for the arts. The centre's main stage can accommodate up to 485 and their studio theatre space can host 150 people. The Oakville PAC operates with less than half of the FirstOntario PAC's staff and hosts around 70 productions a year.

6.2 Non-Profit Model

The Collingwood arts and culture centre would be owned by the Town of Collingwood and managed and primarily used by a non-profit arts organization – otherwise known as the centre's **anchor tenant**. The non-profit organization can then be governed by a board of directors composed of members of the Town's arts, culture, and creative community. The Town would need to create an agreement with the arts organization to stipulate funding and other support arrangements, while also laying out rules to ensure the wider community can also access the space.

Table 15: Pros and Cons of a Non-Profit Model

Pros	Cons
▪ Access to wider pool of funding, as the non-profit will be able to access support from local, municipal, and federal arts councils and other funding agencies. ▪ Greater independence in the arts centre's operations as the managing organization operates separately from the Town. ▪ Likely to raise more money in annual fundraising and sponsorship. ▪ Creates greater accountability and connections within the community.	▪ Managing an arts organization and the arts centre can prove time consuming for staff members – which can lead to less support being provided to other external users of the space (e.g., the Collingwood community, visitors, renters of the space, etc.) ▪ Depending on the vision and mission of the organization, might be less keen on social/local cultural purpose, and more interested in bringing in outside acts.

An example of a non-profit governance model can be seen at the Tett Centre in Kingston, ON. The Tett Centre for Creativity and Learning is an independent, charitable arts organization that operates a historic, City-owned building as an arts hub. They create and coordinate accessible programming and events for all levels of experience and abilities. The centre is home to nine resident arts organizations, eight individual artist studios, four multi-purpose rental spaces, and a waterfront café.

6.3 For-Profit and Public/Private Partnership Management Models

The Collingwood arts and culture centre would be owned and/or managed by a developer, large entertainment company, or a collective of Collingwood's cultural and creative entrepreneurs. This is commonly the case in large entertainment complexes that serve a wider community of presenters and performers. In this case, the Town of Collingwood would either sell the property to a for-profit company or, more commonly, lease the space to any of these groups and have them fully manage operations. A public/private partnership can also take the form of private company coming in as a funding partner and sharing operational and management responsibilities with the Town of Collingwood.

The strengths and weaknesses of a for-profit management model are presented in the table below.

Table 16: Pros and Cons of a For-Profit Management Model

Pros	Cons
▪ Encourages urban rejuvenation. ▪ Has the potential to be a strong economic generator. ▪ For-profit presenter groups are more likely to bring in outside, high calibre talent acts that	▪ Less of a focus on attracting smaller grassroots arts groups. ▪ Focus on economic viability over accessibility. ▪ Would not necessarily attract other investors unless there were operating funding guarantees and/or other incentives.

Pros	Cons
can be more attractive to regional/tourist audiences.	

An example of a for-profit management model can be seen in Hamilton's three performance venues: FirstOntario Centre, FirstOntario Concert Hall, and The Studio, which are managed by Core Entertainment. Core Entertainment provides event management, food and hospitality services to the renters of these venues – delivering high-quality, profitable event experiences.

6.4 Cultural District Model

In the past, efforts have been made by Collingwood's arts and culture stakeholders to brand Simcoe Street as a cultural district. As a result of these efforts, it is now known as Creative Simcoe Street - Collingwood's downtown entertainment district.

Building on this informal designation, Collingwood could consider formalizing this branding of Simcoe Street and capitalizing on the relationships of those cultural stakeholders within by turning it into a *cultural district*. To do so, an arms-length Community Development Corporation (CDC) is created to manage the branding and promotion of all of Collingwood's arts and cultural assets, businesses, and organizations in the downtown. This typically involves a general partnership between the CDC and members of the cultural district. Cultural businesses in the district might pay a small membership fee. There are typically many committees involved in the management of a cultural district, one of which is tasked with managing and attracting events to the area. This committee could then play a role in managing and finding users for a new Arts & Culture Centre in Collingwood – the exact nature of which would be laid out in a municipal framework.

Some pros and cons of using a cultural district model are presented in the table below.

Table 17: Pros and Cons of Cultural District Model

Pros	Cons
▪ Encourages the development of the Centre as well as existing arts & cultural spaces and businesses – so ensures the Centre doesn't detract from existing businesses. ▪ Builds a sense of community among Collingwood's cultural and creative organizations & businesses. ▪ Brands & markets Collingwood's arts, culture, and creative community ▪ Instils a sense of pride in the arts, culture, and creative communities and the wider locals.	▪ These districts are usually started & managed from a bottom-up effort – but there are many stakeholders in the Collingwood community with different perspectives on how a centre might be optimally managed that could create friction together in a CDC. ▪ Requires heavy financial investment from government. ▪ A bit bureaucratic – managed by many different boards, committees, and groups.

A cultural district model may prove to be a viable and lucrative option for Collingwood's future, building on the strength of Creative Simcoe Street. Some examples of cultural districts include the Quartier des Spectacles in Montreal and Calgary's Arts Commons.

6.5 Programming Considerations

Interviewees frequently cited the artist development potential of a new "high-quality" performance space in Collingwood. If the centre were to attract big name acts and performers, supports should be put in place to provide opportunities for Collingwood's local artists to develop their brand beside them – this could be done by **having high-profile performers use local performance groups as their "opening acts"** as a condition of obtaining rental contracts.

Similar to Ontario Present's Tour Block Booking Program, Collingwood's Arts & Culture Centre might consider developing **co-productions/presentations/partnerships with other festivals/tours in the**

region to create further performance and branding opportunities for local artists. The Canadian Live Music Association and Blue Mountain Resorts have expressed interest in working with Collingwood to develop a music strategy and co-branded events.

The centre might consider a **performance incubator model,** encouraging innovation in the art form as well as artist development. The Theatre Centre in Toronto operates under a unique arts-incubator model. Its main activity is managing its Residency Program, which supports artists and arts groups in the development and production of "innovative, provocative, and ambitious" new works through a structured two-year process. Grants are provided through a partnership with the Bank of Montreal (BMO).

Consultations identified the need for an arts and culture centre to act as an incubator for local talent, as was reflected in the vision statement provided in Section 1.3. As such, programming should be balanced between offering venue space for performances and other cultural activities and providing developmental support for local artists.

7. Conclusion

On the basis of demand from the community, local stakeholders and a consideration of future potential, the findings of this study indicate that an arts and culture centre in Collingwood would be feasible, provided certain design, development and start-up conditions can be met and the overall implementation executed capably. Success depends on many factors from ensuring continued community buy-in, strong leadership particularly related to market attraction, programming and promotions as well as a commitment from the Town towards the annual subsidy.

The range of options include inherent risks in implementation. While it is tempting to cast the smaller facility as the "less risky" of the two, the larger venue could be more attractive to outside performers and acts seeking a minimum threshold of profit for performances. A venue on the smaller end of the spectrum, however, is more within the reach of the local sector today, but may fall short as Collingwood grows. Determining the optimal capacity will require further investigation but may lie in the upper end of Scenario 1, towards 600 seats. Despite higher upfront costs, fundraising efforts and a strong capital campaign could bring an 800-seat venue more to the fore, but would require clear commitments to accessible and affordable programming for local users.

In this section, we recommend immediate and longer term next steps toward achieving the goal of developing an arts and culture centre that meets the Town's needs and is sustainable.

7.1 Next Steps

The next steps proposed here aim to capitalize on the momentum created by the presentation of this analysis to Council. Much will rest on the direction Council wishes to pursue. The following action items support an initial roadmap for advancing to the next implementation phase – whether internally or through a competitive RFP process(es):

- **Adjust and refine the pricing strategy and fill capacity along the spectrum of seating scenarios from 400 to 800 seats:**
    - Nordicity's modelling tool is highly dynamic and will be shared with the Town of Collingwood to support updated usage and demand forecasts based on new information following this report.
    - The Town may refine assumptions around, for example, the balance of "Ticketed" and "Community" rentals throughout the year by building a more robust calendar of events/availability based on verified demand from known and new potential user groups (local, regional national – e.g., established promoters).
    - Identify, in particular, at what ticket price point, accessing the arts centre becomes *infeasible* for Collingwood residents and artists/organizations. Seek to understand what the community can realistically be able to pay (for tickets and rentals) and how that threshold may impact the annual budget deficit and the core principles of accessibility and affordability to the Town.
- **Re-engage key stakeholders and practitioners to ascertain their commitment and buy-in for the arts and culture centre – and in what capacity**:
    - Socialize this report amongst Collingwood's arts and culture stakeholders, organizations and members of the public to gain buy-in and expose gaps and areas for further consideration.
    - Work with the Lex's to assess potential vision in Simcoe Street Theatre to position it as the launchpad for the region's performing arts sector and explore the necessary capital investments to support necessary accessibility upgrades.

- Engage The Collingwood Arts, Culture, and Entertainment Group (CACE) and assess their realistic capacity for fundraising and capital campaigning. Build on CACE's existing fundraising study to identify prospective donors, sponsors, and the overall foundation for the fundraising campaign once a vision and scope are agreed on.

- **Depending on the response to the findings in this report, advance "prebuilding initiatives" such as:**
  - Familiarize local sector with the ticketing and rental pricing assumptions embedded in the model and potential impacts on their own ambitions, growth targets, programming opportunities throughout the calendar
  - Support audience development, fundraising (donor base) and early programming vision with showcase opportunities for a range of Collingwood's artists (and the region) to demonstrate commitment to local sector's access and achieving/transferring benefits to them.
  - Explore and identify prospective anchor tenants: Many arts centres feature one "anchor tenant" who uses the space throughout most of the year and become synonymous with the space itself. Explore benefits and drawbacks of an anchor tenant in the centre, as well as interest from the sector e.g., Theatre Collingwood and/or South Georgian Bay Tourism.
  - In advance of hiring, Town of Collingwood leads should forge connections with producers, tour managers and programmers to build out a realistic program calendar that supports the overall viability of the centre.
- **Engage with regional partners and industry associations and funders to share findings, assess implication/impacts and identify potential partnership strategies:**
  - Meet with, for example, Blue Mountain Resort, South Georgian Bay Tourism, surrounding municipalities including Town of Barrie Economic Development, local Indigenous leaders etc.
  - Connect with Canadian Live Music Association, Ontario Presents and other broad stakeholders to inform of vision, ambitions and overall strategy.
  - Identify and prepare funding applications for, for example, Canada Cultural Spaces Fund and other sources of public funding.
- **Whether through external RFP or internal task force, advance site selection and capacity determination based on the findings of this study.**
  - Based on the findings in this report, determine final facility size, seating capacity, land requirements and building size and move forward with site selection.
  - Review the suggestions provided in this study in view of the infrastructure development plans the Town has for the next 5-10 years. This review should help to determine an optimal timeframe for the Centre's development, and the availability of financial resources to support it.
- **Identify and select desired governance strategy and consider early recruitment, pre-build, for professional manager/marketer/programmer.**
  - Recognizing that at any size/capacity, there is enormous marketing pressure on this facility to be a success. The optimal programmer/manager would be engaged well in advance of opening to forge connections and promote the venue 1-2 years before it is available to rent.

This study represents a vital step in the long journey towards bringing an arts and culture centre in the Town of Collingwood to realization. It has advanced and concretized the vision, concept and features, key success factors and the business model for a spectrum of feasible options. The objectives for an arts and culture centre can be achieved. The direction pursued, however, will depend in part on the prioritization of those objectives – balancing the needs of the local community today and the vision for growth heralded in the coming ten to fifteen years.

Appendix A. Market Assessment

The existing demographics and dynamics in Collingwood and the surrounding region are critical to understanding the potential future demand and feasibility for an Arts Centre. In this Appendix, Nordicity presents its analysis of demographics, household spending and the local and regional market.

A.1 Population Growth, Income, Household Spending and Demographics

In 2020 and 2021, anecdotal evidence and Toronto Life articles painted a picture of GTA residents and families descending on Collingwood in droves, driving up demand for kindergarten classes, snapping up available property and/or living in their weekend cottages full-time while taking advantage of remote work flexibility. Indeed, Collingwood seems to be a magnet for young families, a growing creative class, and highly-active retirees that value year-round recreation. Some high-level observations about cultural participation in Ontario:

- On average, Ontario audiences participate in 2.4 broadly "cultural" activities per month. This figure drops to 2.0 per month for Ontario's "Central" region that includes Grey and Simcoe Counties (Culture Track Ontario)[13]
- Community size has a bearing cultural participation: Those living in cities (over 50,000 people) report being more culturally active than those in less densely populated areas in Ontario (Culture Track Ontario)
- Education is the strongest pattern in arts participation: Higher education equates to higher arts participation (Hill Strategies)
- Audiences are divided by income and, to a lesser extent, age. Those with high household incomes, and generally older, make up a large proportion Performing Arts audiences. (TAPA)
- Affordability is key to accessibility: Cost is a key barrier to attendance. (Culture Track, TAPA)

Our analysis of Collingwood's demographics, household spending and size, is based largely on census and other regional demographic data from Statistics Canada. This analysis suggests that Collingwood boasts many of the positive features we associate with the success of an arts and culture centre but that its market size (or population) and growth rates alone would not justify the investment. As such our proposed scenarios aim to find the balance between an arts and culture centre that is accessible to locals while also attracting the type of performers that draw a wider crowd from surrounding communities, making the space more economically viable.

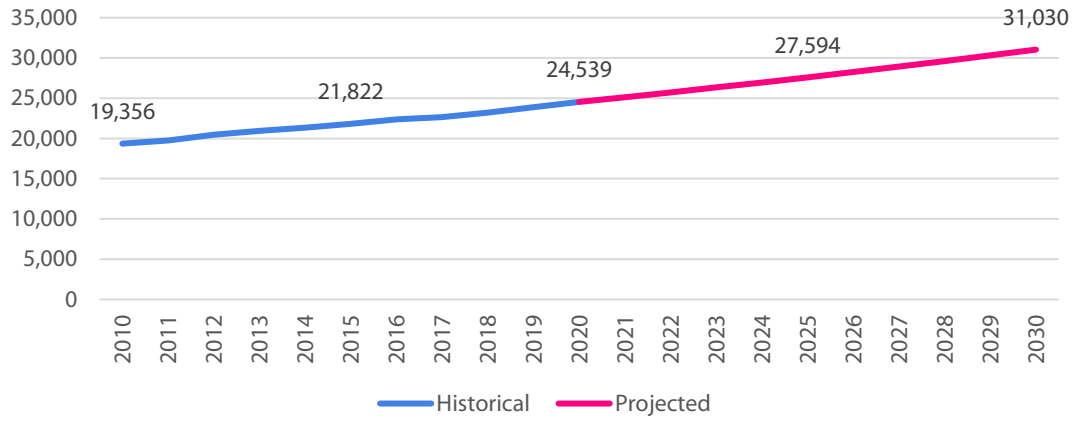
Population and Growth

With the largest population in the area, Collingwood functions as the major commercial centre for northwest Simcoe County and northeast Grey County, serving an overall trade area of approximately **75,000** people.

[13] Sources: Culture Track – Ontario Focus 2018, : TAPA Audience Survey: Attendance and Engagement with Arts and Cultural Activities in Toronto, Hill Strategies, Demographic Patterns in Canadians' Arts Participation in 2016 - see more detail in Appendix

Collingwood's annual population growth from 2015-2020 was **2.6%,** exceeding the surrounding region (1.7%) and Ontario (1.6%).[14] The figure below shows Nordicity's projected population growth estimates for the Town of Collingwood.

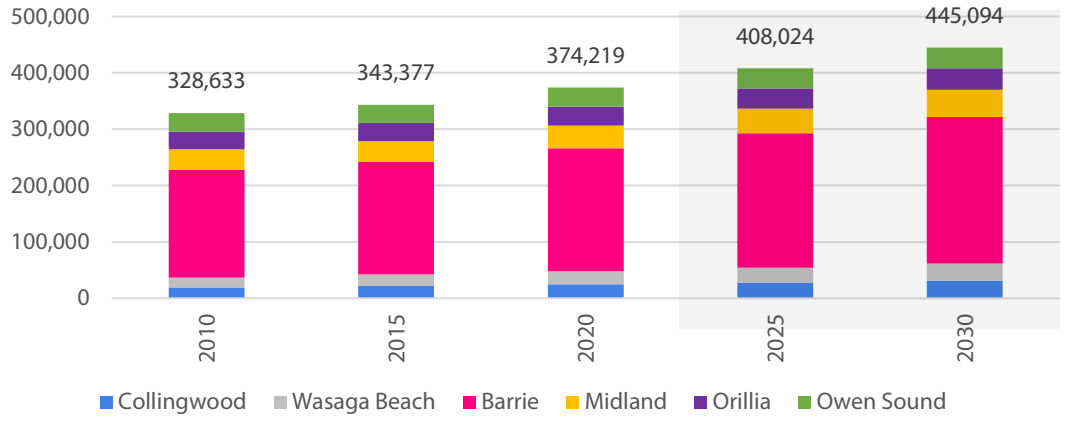
Figure 8 Historical and projected population growth in Collingwood



Source: Census and Statistics Canada Table 17-10-0135-01

The figure below compares the historical and project population growth in the region that Collingwood may be able to draw on as its arts and culture audience and participants:

Figure 9 Historical and projected population growth in region



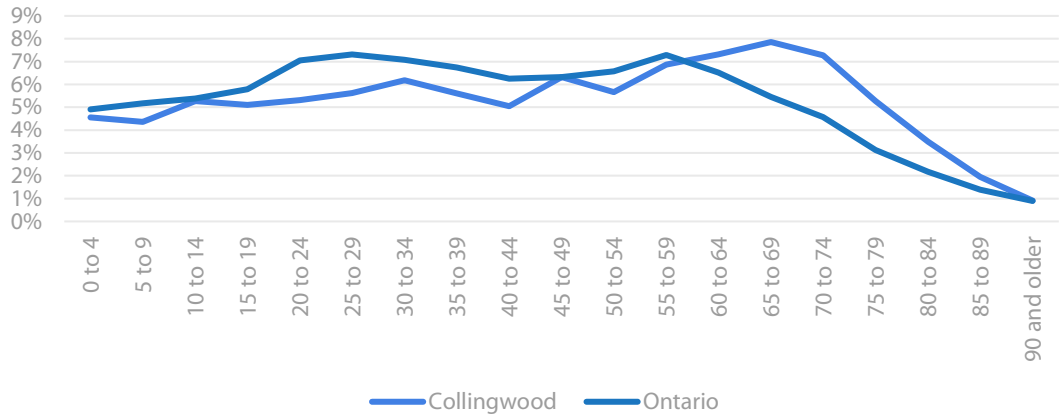
Source: Census and Statistics Canada Table 17-10-0135-01

- Assuming its growth rate continues, Collingwood's population will reach **31,030 in 2030** alongside a **regional population of 445,094**. Remote work flexibility and other factors may accelerate regional migration over the coming five to ten years, but difficult to predict at this time.

[14] Source: Census and Statistics Canada Table 17-10-0135-01

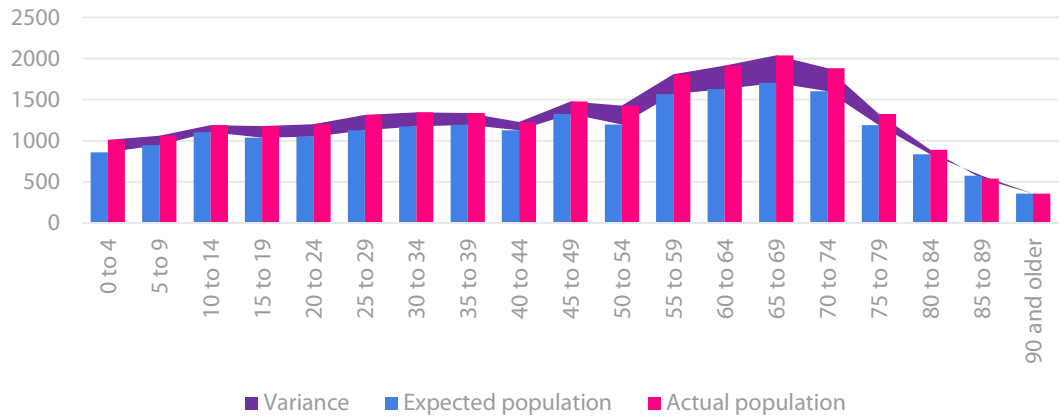
- Collingwood has a notably larger share of individuals 55 years and older than the overall population of Ontario.
- Collingwood also has a higher ratio of children under 20 to parent-aged adults, indicating that more households have children and/or households with children have more children than the Ontario average.
- Growth was driven by inbound migration of retirees (52.3% of net inbound migration was 50 years or older) but also families with young children

Figure 10 Historical and projected population growth in Collingwood



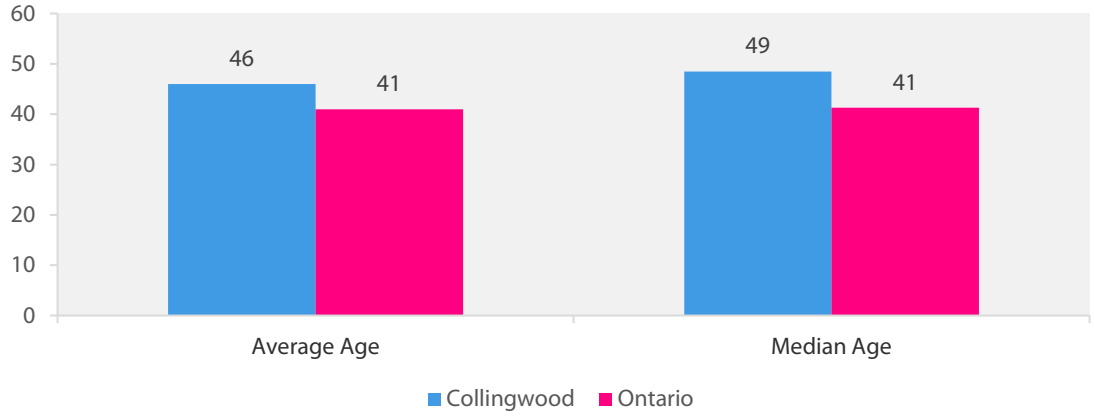
Source: Statistics Canada Tables 17-10-0135-01, 13-10-0114-01, 13-10-0418-01

Figure 11 Net migration analysis of Collingwood from 2015 to 2020



Source: Statistics Canada Tables 17-10-0135-01, 13-10-0114-01, 13-10-0418-01

Figure 12: Average and median age Collingwood vs. Ontario

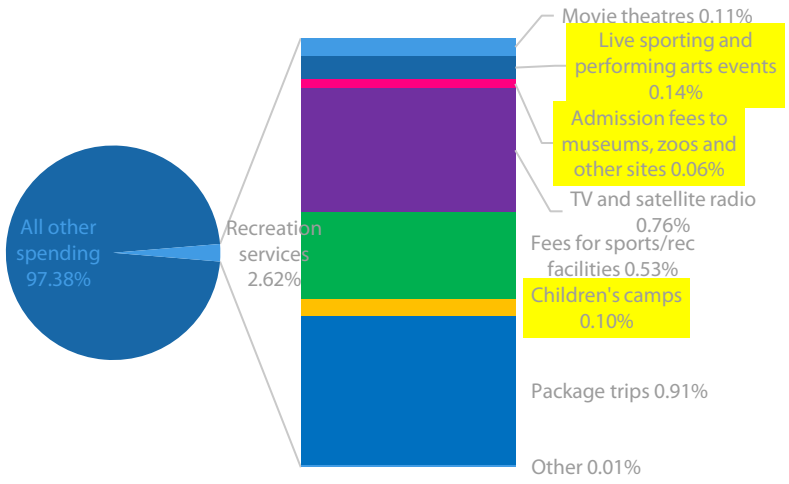


Source: Statistics Canada Census Profile 2016

Income and Household Spending

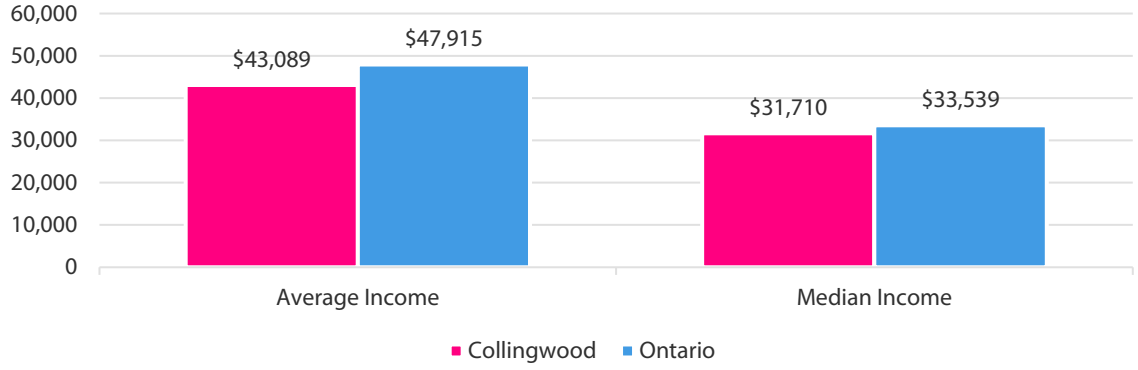
- Average household spending is $69.6k per household in Ontario in population centres with a population of less than 100k people.
- Of that amount, 0.20% is spent on in-person sport and culture services and 0.10% on children's camps.
- A local population of 30k (i.e., the projected population of Collingwood in 2030) would generate an estimated $4.1M of sport and culture spending and a $2.1M market for children's camps.
- A regional population of 445k would support an estimated $61M of household spending on sport and culture and $31M on children's camps.

Figure 13: Household spending in ON in population centres with population less than 100k



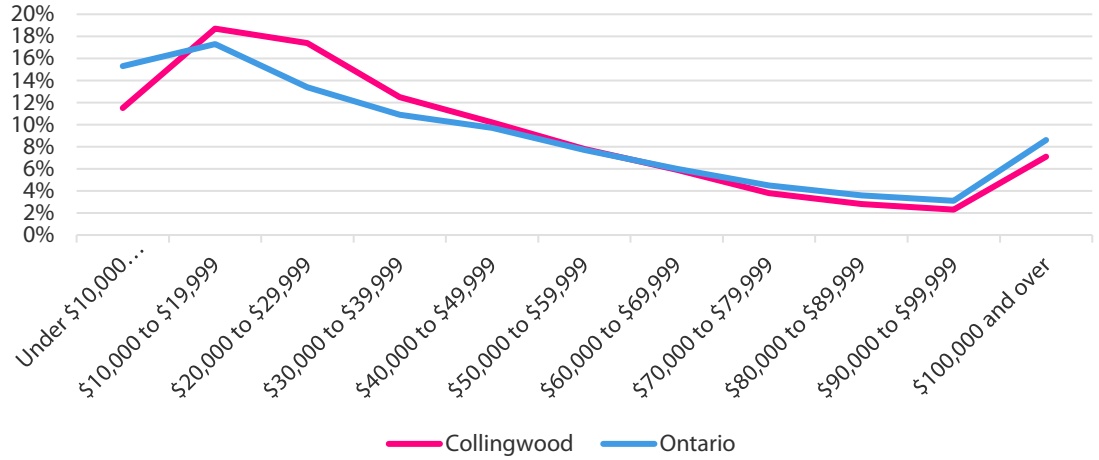
Source: Statistics Canada Survey of Household Spending 2015

Figure 14: Average and median income Collingwood vs. Ontario



Source: Census and Statistics Canada Table 17-10-0135-01

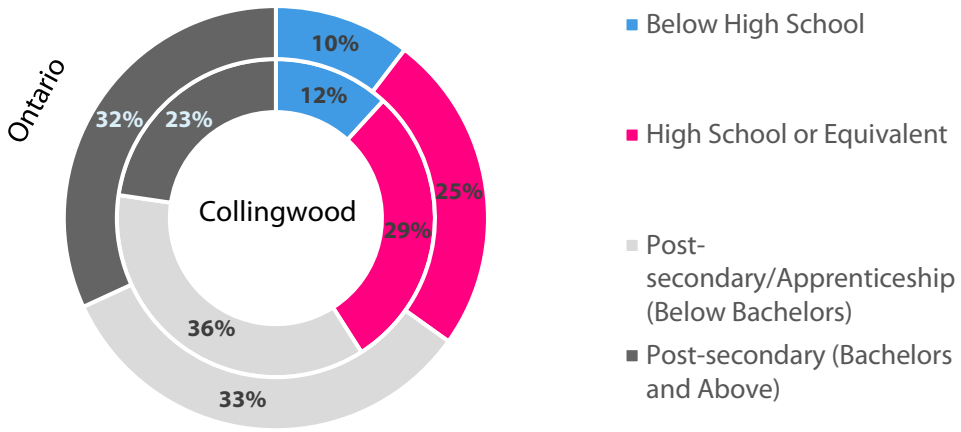
Figure 15: Total income distribution of Collingwood vs. Ontario



Source: Census and Statistics Canada Table 17-10-0135-01

- Income distribution shows that it's consistent with Ontario (except with that spike in the 20k-29k)

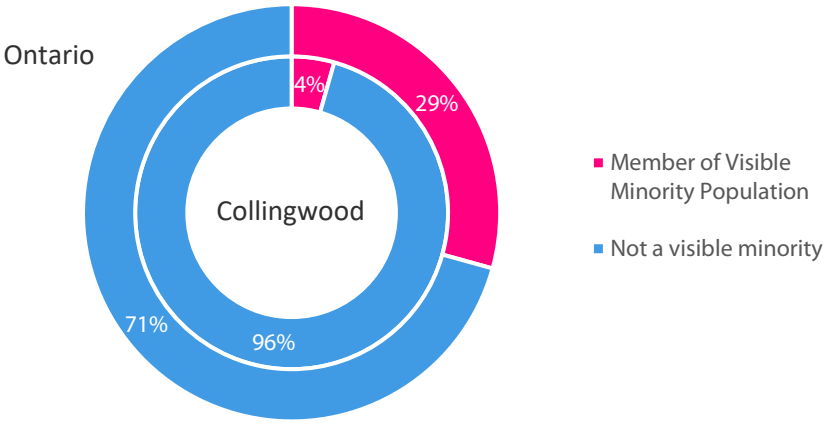
Figure 16: Highest educational attainment of 24-64 years old



Source: Source: Census and Statistics Canada Table 17-10-0135-01

- A smaller share of Collingwood's residents has completed post-secondary education as compared to Ontario.

Figure 17: Visible minority population

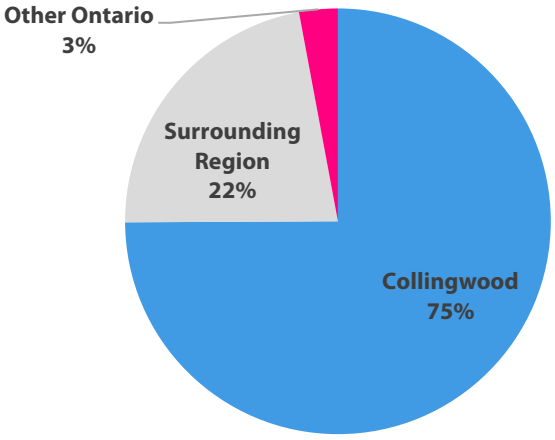


Source: Census and Statistics Canada Table 17-10-0135-01

Appendix B. Survey Responses

The survey was open to residents of Collingwood, residents of surrounding Towns/Townships that are within a 1-hour radius of Collingwood, seasonal residents, and visitors. The following chart shows a breakdown of respondents by location.

Figure 18: Location of Survey Respondents



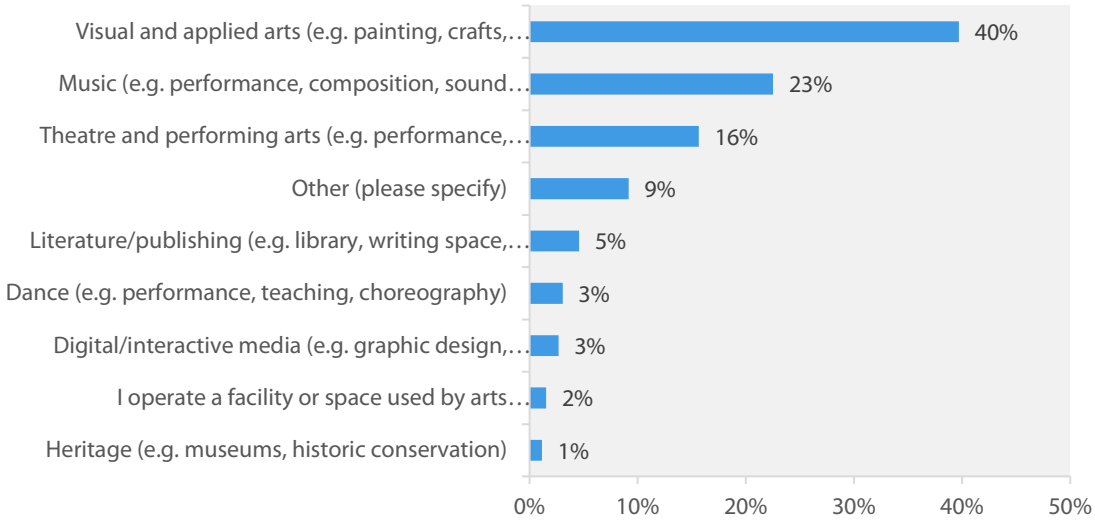
n=1635
Source: Collingwood Arts Centre Feasibility Study survey by Nordicity, 2021

- The majority (75%) of survey respondents were Collingwood residents, indicating a strong response from the local community. The surrounding region(s) were also well represented, with 22% of respondents.
- When asked to identify the different capacities in which they are answering this survey, the vast majority (89%) responded as members of the public, a sixth (15%) as practicing artist/cultural workers, and just 3% as owner/operators of a cultural organization or facility.

Based on the above, in a sense when we look at the broad survey data results, we are seeing the responses of members of the public who live within an hour's drive from Collingwood.

For the 18% of survey respondents who identified as members of the arts and culture sector (either representing artists, cultural workers, cultural organization and facility owners both in Collingwood and the surrounding region) their respective sectors are displayed in the chart below:

Figure 19: Breakdown of arts and culture sector respondents by sector

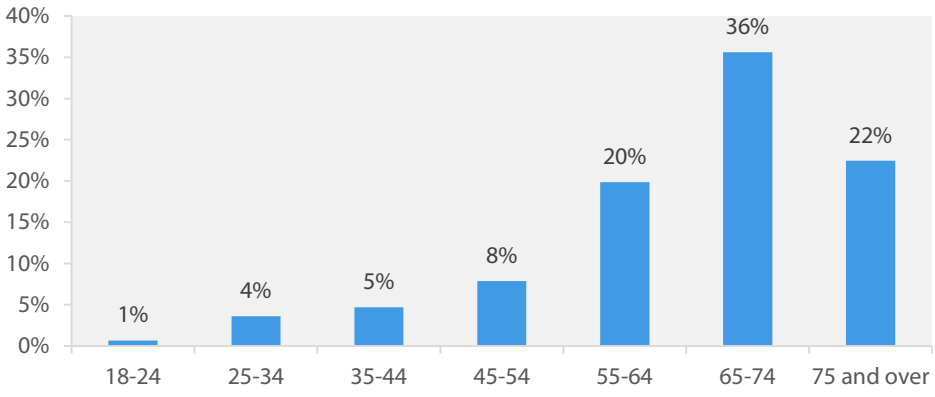


n=262
Source: Collingwood Arts Centre Feasibility Study survey by Nordicity, 2021

- Arts and culture sector respondents largely represented those in the visual and applied arts (40%), music and performance (23%), and theatre and performing arts (16%) sectors.

The age breakdown of survey respondents is displayed in the chart below.

Figure 20: Age breakdown of survey respondents

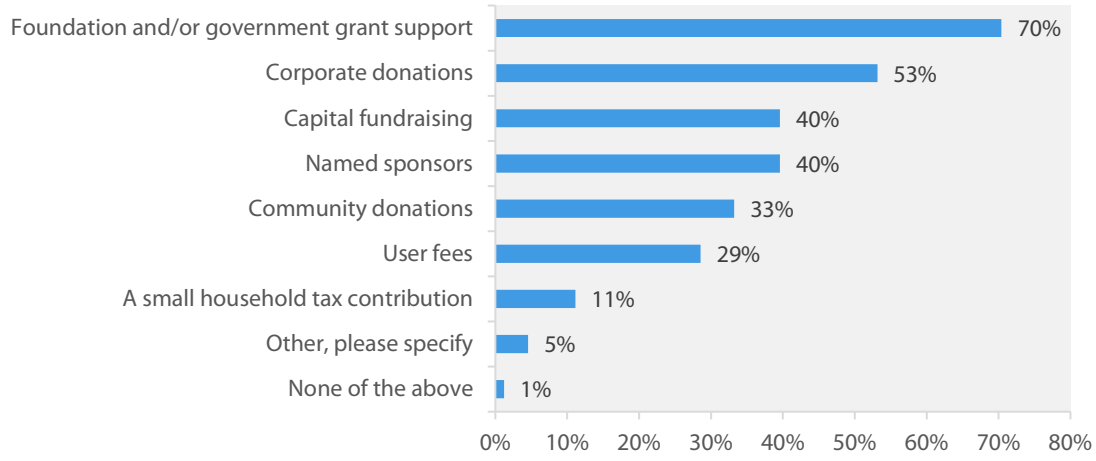


n=1550
Source: Collingwood Arts Centre Feasibility Study survey by Nordicity, 2021

- More than half of respondents were of retirement age, with just 10% representation from community members aged 18-44.
- That said, some 324 respondents or **20%** of our sample noted having children under the age of 18 living at home.

The Collingwood Arts Centre Feasibility survey asked respondents what supports should be prioritized to support the development of a new arts facility in town. The responses from Collingwood residents are presented in the chart below.

Figure 21: Financial supports for an arts centre prioritized by Collingwood-based survey respondents



n=1159
Source: Collingwood Arts Centre Feasibility Study survey by Nordicity, 2021

The majority of respondents would prioritize having a new arts centre supported through foundation and/or government grant support (70%), corporate donations (53%), and capital fundraising (40%). Fewer Collingwood residents were in favour of supporting the space through user fees (29%) and household tax contributions (11%). Other suggestions included:

- Setting up an art society to manage the space, allowing them and their members to fund all operational and capital costs;
- Accessing funding through the Ontario Trillium Foundation;
- Offering corporations space within the centre for rent and/or sale;
- Increasing property taxes on big box stores in the area; and,
- Have it owned by the private sector.

Appendix C. Collingwood and Regional Facilities

Collingwood Facility	About	Type of Facility	Capacity
Tremont Studios	Located in the Creative Simcoe Street neighbourhood, on the second floor of The Tremont, there are 10 working artists in individual studios, creating a diverse variety of art.	Art studios for resident artists	10 studios, but are fully rented. Studio have varying sizes and can be rented for short or long-term lease
New Life Church	New Life Collingwood is a community church located in Collingwood, Ontario. Spacious facility open for rent for weddings, funerals, concerts, fundraisers, ministry events, and more.	Auditorium Meeting Room Gymnasium Kitchen Classrooms The Lobby	Smaller classrooms (10 people) to Auditorium (440 people) (see pdf on number of people per room)
The Historic Gayety Theatre	Est. 1911. A 300-seat (325 person) capacity on Collingwood's main street in the heart of the Historic Heritage District. Auditorium, sound system supported by theatrical lighting, a sprung stage with wings, raked seating.	Theatre	350
Simcoe Street Theatre	Intimate 100 seat blackbox theatre in downtown Collingwood. The theatre is available for short and long term rentals. It's an ideal venue to hold productions, concerts, lectures, art shows, classes, meetings, private functions and workshops.	Theatre	100 seats
Collingwood Foundry	A co-working space and community space for entrepreneurs.	The Pod South Boardroom The Media Room Main Floor Event Space Main Boardroom	It has rooms and space of various sizes, from a 2-people meeting room, to a large event space that could fit roughly 20 people or so.
Canadian Legion, Collingwood Branch	The Normandy Room is a site for many wedding receptions and banquets such as the Robbie Burns	The Normandy Room The Sports Room The North Atlantic Room The Board Room	The Normandy Room: 286 The Sports Room: 100 The North Atlantic Room:

	dinner, Green Beer Day, Ladies Auxiliary activities and sales , Monday Night Bingo, plus other community events.		30 The Board Room: 15
The Shipyard Amphitheatre	Community park. It features a number an open-air natural amphitheatre at its north end facing Collingwood Harbour. Host live theatre and open-air concerts and festivals.	The Amphitheatre itself	200+
Curling Club Lounge	Rental facilities include the Function Room area and/or the Ground Floor Space. There's a viewing area of the ice floor from the function room.	The Function Room Function Room + Ice Floor	The Function Room: 100 seated (200 standing) Function Room + Ice Floor
Eddie Bush Arena	The Arena presently is operational year-round for hockey, figure skating, various school functions and special events.	Floor Rental Meeting Room	

Regional Facility	**About/Features**	**Audience Attraction**	**Stats / Notes**
Meaford Hall	Historic facility 330 seats Opera House Live performances in the Opera House Community and corporate events in the Galleries and Terrace Room	$1,900 day for the main hall Used by Fleetwood Dance and Collingwood School of Dance regularly for performances	Meaford Population: 11,000 (2016) (re)Opened in ~2006? Distance to Collingwood: 30 minutes
Orilia Opera House	677-seat auditorium/main stage Intimate 100-seat Studio Theatre City-owned, city-funded, professionally staffed	Produced professional theatre during the summer and presents concerts and educational programming throughout the year. Plus, 200 additional performances are presented by the local community including the Orillia Concert Association, Mariposa Theatre Arts Foundation, Orillia Silver Band, and a number of local dance studio performances	Midland Population: **31,200** (2016) Opened in **1895** Distance to Collingwood: 1 hour drive

Midland Cultural Centre	Rotary Hall, a **274-seat multi-purpose space** Huronia Players Community Theatre Group, with a **121-seat theatre** An Indigenous Art Gallery Quest Art School + Gallery with exhibition and classroom space, A café	**70,000** visitors per year overall Sells **17,000 tickets** per year for various performances, concerts and special presentations	Midland Population: **17,000** (2016) Opened in **June 2012** Distance to Collingwood: 1 hour drive
Five Points Theatre	Fully equipped 10,000 sq ft. theatre is available for professional theatre, music, dance and activities including seminars, workshops, presentations and conferences. Flexible seating capacity of **120–200** Versatile & flexible stage area + Sprung performance floor System of stage lights & sound reinforcement Artist's green room/lounge + Performers dressing rooms with showers Managed by the Department of Culture	127 bookings, excl. community uses (e.g., city functions and youth drop-in programs) Cost the municipality $594,370 to operate. Along with Georgian Theatre, earned $444,979 (together) in 2017	Barrie Population: **153,000** (2017) Opened in 2011 (as Mady Centre) Distance to Collingwood: 45 minute drive

Appendix D. Financial Forecasts Assumptions

Construction costs:

- A key source to estimate the infrastructure cost per square-foot was Altus Group's 2021 Canadian Cost Guide.
- The list of infrastructures, spaces and services (i.e., must-have, should-have and could-have) was developed in collaboration with CACE.
- Nordicity also anticipates annual maintenance costs of $67,000, based on an industry standard cost of $1.75 per square-foot.

Concert hall and events:

- The fill rate was estimated using a set of comparative facilities, supplemented by interview with local stakeholders that showed interest in the creation of this facility and assumptions provided by the Collingwood Arts, Culture and Entertainment (CACE) group. Nordicity took an analytical approach, with estimate rentals based on validated CACE estimates, adjusted to reflect results of Nordicity interviews and Nordicity assessment of likely utilization based on facility specs (e.g., the 800-seat facility would see less use from small local renters due to higher cost, and inability to fill the larger hall to a comfortable level as illustrated in scenario 2)
- Note that ticketed and community events start at a validated initial level. By year 5, the larger scale commercial events grow to an estimated maximum, largely informed by Nordicity's estimate of the maximum user base. As such, in scenario 1, ticketed performances grow from 10% to 30% of the centre's concert hall programming in years 1 to 5. In scenario 2, ticketed performances grow from 10% to 47% over the same period.
- Community events were assumed to grow to a level that would fill the remaining capacity (to a maximum of rental capacity remaining after accounting for commercial occupancy).
- As far as reception events are concerned, the occupancy was estimated to grow to two days per week by year 5, independent of the auditorium rentals.

Net income per event:

- Attendance and facility fees are based on fill rate research at comparable facilities adjusted with stakeholder interviews.
- Food and beverage revenues and costs are calculated on a per capita basis from Nordicity's past engagement with other cultural centres and live performance venues. Patrons are expected to spend an average $6.50 in food and beverages at ticketed events and an average $3.00 at community events.
- Costs recovery (i.e., production, security and front-of-house) at ticketed and community events was estimated using industry standard rates observed in the context of prior engagements. As such, recovery revenues are calculated as 110% of the corresponding expenses (i.e., production, or security and FOH) for *Ticketed* events and 100% of the corresponding expenses for *Community* events.

Income statement:

- Net event revenues = number of events x [direct revenues-direct expenses]

- Ancillary event revenues = number of events x net bar and catering
- Fundraising and sponsorship: a larger facility (i.e., scenario 2) would be proportionally less reliant on fundraising as it would attract higher-profile events. However, the desirability of sponsorship would be greater for a larger venue as described in scenario 2.
- Maintenance is calculated on a per sq. ft basis (see construction costs)
- Other fixed expenses are estimated from comparable facilities:
    - Non-event security: 2 full-time equivalents (FTEs)
    - Custodial services: 1 FTE plus supplies (50% larger in scenario 2)
    - Administration: 3 FTEs
    - Marketing: 1 FTE (50% larger in scenario 2)
    - Fundraising expense: direct marketing and annual reception

Appendix E. Location Analysis

Site	Address	Approximate Building Footprint (sq ft)	Current Height (storey)	Gross Area (sq ft)	Size fits Option 1?	Size fits Option 2?	Owned by Town?	Recommended Build Types	Suited for further study?
Business Development Centre	105 Hurontario St.	3300	1	3300	No	No	Yes	None	No
Collingwood Museum	45 St. Paul St.	30000-77000	1	30000-77000	Yes	Yes	Yes	Addition	Yes
Eddie Bush Arena	96 Hurontario St.	40000	1	40000	Yes	Yes	Yes	Adaptive Reuse OR Adaptive Reuse + Addition	Yes
Federal Building	44 Hurontario St	8000 (+5000)	3	39000	Yes	No	No	Adaptive Reuse + Addition	No
Harbourview Park	Cedar St.	275000	0	275000	Yes	Yes	Yes	New Build	No
Leisure Time Club Land	100 Minnesota St.	131500	1	131500	Yes	Yes	Yes	Addition OR New Build	Yes
Millenium Park (Grain Elevator Site)	Millenium Park	302500		302500	Yes	Yes	Yes	New Build	Yes
Parking Lot 1	Beside Eddie Bush	36800	0	36800	Yes	Yes	Yes	New Build	Yes
Parking Lot 2	Ste Marie St north of Simcoe St.	30500	0	30500	Yes	Yes	Yes	New Build	Yes
Parking Lot 3	Pine and 2nd St.	39200	0	39200	Yes	Yes	Yes	New Build	Yes
Public Library	55 Ste Marie St.	20200	3	60600	No	No	Yes	None	No
Simcoe Theatre	65 Simcoe St	8400 (+5300)	1	13700	Yes	No	No	Adaptive Reuse + Addition	No

Site	Notes & Considerations
Business Development Centre	This site is currently in use and it is anticipated the current use will remain in the future. Given the gross area of the site, this would mean that the arts centre would need to be built above as an addition resulting in a height too tall to fit into the HCD, so it is not recommended for further study.
Collingwood Museum	Could build an addition behind and north of the museum (nice frontage onto Huron St connecting to waterfront), however would need to be multiple storeys and requires further study to determine impacts on the historic site. Highly walkable location, within "Arts District", near various downtown parking lots.
Eddie Bush Arena	The building is currently in use and the feasibility of this site depends on the development of a future Collingwood MURF that would move the current uses to another site and free up the building for adaptive re-use. If the building approach is adaptive re-use only, then only Option 1 fits. However, to fit Option 2 there is the potential to use an adaptive re-use approach plus a new addition, either above the existing building or beside it into Parking Lot 1. Highly walkable location, within "Arts District", near various downtown parking lots.

Site	Notes & Considerations
Federal Building	Given the size of the site, it would be challenging to fit Option 1 and not possible to fit Option 2. Further study would be needed to determine if Option 1 could be achieved by building a new addition for the theatre space in the parking lot and adaptive re-using the existing building into the non-theatre spaces. Given the space challenges, and the fact that this site is not owned by the Town, it is not recommended for further study.
Harbourview Park	While there is sufficient space on this site and it is owned by the Town, the location is not within walking distance of Downtown "Arts District". Given that there are a number of other sites available for further study, this location is not recommended at this time.
Leisure Time Club Land	Significant space for both Option 1 and 2. The adjacent Friendship Garden Park offers outdoor amenity space that could be adapted and integrated into outdoor space for the arts centre. Highly walkable location, near trail as well as various downtown parking lots. Any change to this site requires funding for existing Leisure Club activities to be supported and re-housed in another location meeting the Leisure Time Club's needs.
Millennium Park (Grain Elevator Site)	The Town already plans to issue a Developer RFP for the Grain Elevators, and as such they are not recommended for re-use into an arts centre given the complexities associated with both the current structure, and the building requirements and standards needed for the new arts centre. However, there is considerable space directly North and South of the Grain Terminals. A new build could be established on this site, integrating outdoor space with Millennium Park. The establishment of a new cultural destination along the waterfront beside the already iconic Grain Terminals would offer significant cultural value to the Town and community. While this location is not easily walkable from Downtown, it aligns with the Collingwood Waterfront Master Plan.
Parking Lot 1	Could be an independent new build on the site, or a new addition attached to the adjacent Eddie Bush Arena. This site also offers the potential for a phased approach to a new Arts Centre, that could involve adaptive re-use of Eddie Bush and then building an addition in the parking lot, or vice versa, allowing for the Town to start small scale and expand overtime to meet community needs. Height of building will depend on which option is selected, and how much of the site needs to remain open parking and/or outdoor space. Highly walkable location, within "Arts District", near various downtown parking lots.
Parking Lot 2	Option 1 would need to be a 2-storey building and Option 2 would need to be a 3-storey building. Highly walkable location, within "Arts District", near various downtown parking lots.
Parking Lot 3	Option 1 would need to be a 1 or 2-storey building and Option 2 would need to be a 3-storey building. Highly walkable location, within "Arts District", near various downtown parking lots.
Public Library	Site not recommended due to size. There is no opportunity for adaptive re-use, given that the facility is fairly new and current building use is anticipated to continue. An addition is not possible given that the building is already tall given the context of the Downtown HCD.

Site	Notes & Considerations
Simcoe Theatre	Given the size of the site, it would be challenging to fit Option 1 and not possible to fit Option 2. Further study would be needed to determine if Option 1 would be possible, however it would likely need to be a 2-storey addition as well as new build in the parking lot. As such, this site is not recommended for further study in relation to Option 1 and 2, but should be considered for the opportunity to renovate the existing space to meet community needs and demand identified in the Study. Highly walkable location, within "Arts District", near various downtown parking lots.