

## Staff Report PRC2023-02

Standing Committee 2023-04-03

Council 2023-04-17

Amendments ☐

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<b>Submitted To:</b>	Corporate & Community Services Standing Committee   Council
<b>Submitted By:</b>	Dean Collver, Director, Parks, Recreation & Culture
<b>Prepared By:</b>	Karen Cubitt, Manager, Culture & Events
<b>Subject:</b>	Collingwood Arts Centre Feasibility Study Phase 2 Report

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### Recommendation

**THAT** Staff Report PRC2023-02, Collingwood Arts Centre Feasibility Study Phase 2 Report, be received;

**AND THAT** Council approves an expenditure limit of \$15,000 from the Arts and Culture Legacy Fund to extend the NGL Nordicity Group contract to facilitate additional site discussions with Streetcar Developments Inc. and further public consultation with respect to the two recommended sites.

### Amendments

None.

## 1. Executive Summary

Phase 2 of the Collingwood Arts Centre Feasibility Study has concluded, resulting in the attached report.

The report recommends a smaller ~400 seat main performance facility (option 1 of the two sizes explored), and a complement of spaces including:

- Public gathering areas
- Front-of-House
- Theatre 1 (higher capacity, fixed seating)
- Theatre 2 (smaller capacity, flexible seating)
- Administration

- Theatre support spaces (green rooms, dressing rooms, etc.)
- Studios/Classrooms
- Additional office and catering spaces
- Retails and market spaces

The report also identifies two potential sites that both meet the needs of the size, scope, and vision for a new arts centre. These are 48 Ste. Marie Street and the Collingwood Terminals Redevelopment.

Given the complexities of the Collingwood Terminals Redevelopment Project and the only-recently-approved MOU, the degree to which this site option could be explored within the Phase 2 scope and timeline was limited.

While the initial intention of the Phase 2 study was to recommend one final site, Giaimo determined that both sites offer feasible, non-comparable approaches, and as such recommends that both be considered further in consultation with Streetcar, the Town, stakeholders, and the public to determine which approach is preferred.

## 2. Analysis

### Background

Since February of 2021, the Parks, Recreation & Culture Department has been working with Nordicity Group Ltd in partnership with Giaimo Architects to conduct an Arts Centre Feasibility Study (CACF) for the Town of Collingwood.

As of July 2022, we entered Phase 2 of the three-phase process outlined below:

**Phase 1:** Determination of need, and the degree of need, for an arts and culture centre in Collingwood.

**Phase 2:** Building on the findings of Phase 1, the development of rationalizations for market, operational, financial, economic, and social-impacts of a facility that may include space for a live performance theatre, secondary halls, workshop

space, parking, public galleries and exhibition space, administrative offices, and classrooms/studios/rehearsal space. The results of Phase 2 will determine the site, size, and scope of the arts and culture centre.

**Phase 3:** Facility design for more accurate costing and shovel-readiness, timeline estimates, contingency planning for displaced community services, funding acquisition and fundraising. Staff have always considered that this will require a consultation approach possibly using as many as two vendors (design/build and fundraising) and a consultant Project Manager, as this is beyond the scope and capacity of staff resources.

Phase 1 is complete, Phase 2 (the subject of this report) is complete to the degree possible, and Phase 3 will be addressed in a future report to Council.

## **Phase 2 Objectives & Scope of Work**

Phase 2 of the CACF, conducted as scheduled between September 2022 and April 2023, had the following objectives:

- Validate the feasibility of the new arts facilities, including the market, operational, financial, economic, fundraising, and social-impact aspects that would underline a recommendation on size and seating capacity.
- Assess the feasibility of a short list of sites and recommend a single site that Council would put forth for any further consultation deemed to be required.
- Determine the target arts disciplines that would be served by the facility, which would include space for a live performance theatre/music and dance, and public galleries and exhibition space for the visual arts.

The scope of work included:

- Interviews with anticipated primary user groups/disciplines to test and rationalize the operating model developed in Phase 1 to validate local market take-up assumptions
- Research on recently established and longer standing venues to test assumptions about revenues to be generated by touring acts; research included interviews of venue operators, tour promoters, and representatives of touring performers
- Research in collaboration with Town staff on locational challenges and opportunities related to the short list of identified potential locations
- Development of architectural rationale and spatial analysis, based on best practices for public space design
- Research of planning, engineering, servicing, or other challenges and opportunities related to potential sites in collaboration with Town staff
- Conducting an economic impact assessment of the value of the outside visitors attracted to Collingwood - based on the outputs generated through the TRIEM modelling tool
- Determining high level capital cost estimates for the recommended site and facility
- Development and presentation of a final report including the location, size, and composition of an Arts and Culture Centre in Collingwood.

The attached Phase 2 report delivers all of this with the exception of a singular site recommendation.

## **Phase 2 Results**

### Size

The research supports an overall preference towards having a smaller ~400 seat main performance facility.

### Scope

The community re-affirmed the need to have the following kinds of spaces in the facility:

- Public gathering areas
- Front-of-House
- Theatre 1 (higher capacity, fixed seating)
- Theatre 2 (smaller capacity, flexible seating)
- Administration
- Theatre support spaces (green rooms, dressing rooms, etc.)
- Studios/Classrooms
- Additional office and catering spaces
- Retails and market spaces

### Site

The six short-listed sites from Phase 1 were assessed and studied by Giaimo through a site selection evaluation framework. Based on this, the short-list was narrowed to two potential sites that both meet the needs of the size, scope, and vision for a new arts centre. These are:

- 48 Ste. Marie St – a new 45,000 sq.ft. arts centre constructed on 35,000 sq.ft of parking lot in Downtown Collingwood.
- Collingwood Terminals Redevelopment – a new 45,000 sq.ft. arts centre integrated with the larger Grain Terminal Redevelopment project currently underway by Streetcar Developments Inc. and Dream Unlimited Inc.

Given the complexities of the Collingwood Terminals Redevelopment Project and the only-recently-approved MOU, the degree to which this site option could be explored within the Phase 2 scope and timeline was limited.

While the initial intention of the Phase 2 study was to recommend one final site, Giaimo determined that both sites offer feasible, non-comparable approaches, and as such recommends that both be considered further in consultation with Streetcar, the Town, stakeholders, and the public to determine which approach is preferred.

## Financial Impacts

Although the expense recommended in this report is not budgeted in 2023, Council approved a reserve of \$1.5 million in Legacy Funding for Arts and Culture (\$1.4 remaining). As the Arts and Culture Centre qualifies as a legacy project, this request continues to be in alignment with the reserve's objectives.

## Conclusion

In order to conduct further consultation with Streetcar, stakeholders, and the public to determine which of the two recommended sites is preferred, staff requests an additional upset limit of \$15,000 from the Arts and Culture Legacy Fund to extend the NGL Nordicity Group contract.

The results of this work (proposed Phase 2.5) will allow staff to return to Council with a single site recommendation along with recommendations for the continuation into Phase 3 of the Collingwood Arts Centre project. The objectives proposed in Phase 3 are intended to yield additional, more precise data that Council will require to make further decisions with respect to pursuing an Arts Centre.

## 3. Input from Other Sources

This report was shared with Department Heads for Review.

Town Finance was consulted specifically regarding the policy related to the Legacy Fund.

## 4. Applicable Policy or Legislation

Community Based Strategic Plan – Encourage Diverse Culture and Arts Offerings  
PRC Master Plan – Recommendation #29: Review feasibility and sustainability of a multi-functional arts and cultural centre for Collingwood.

## 5. Considerations

- |   |                      |
|---|----------------------|
| <input type="checkbox"/> Community Based Strategic Plan:  | Consistent with CBSP |
| <input type="checkbox"/> Services adjusted if any         |                      |
| <input type="checkbox"/> Climate Change / Sustainability: | Not Applicable       |

- ☐ Communication / Engagement: Public Engagement required
- ☐ Accessibility / Equity, Diversity, Inclusion: Not Applicable
- ☐ Registered Lobbyist(s) relating to content:

Next steps and future action required following endorsement:

Future Report to Council required.

## 6. Appendices and Other Resources

**Appendix A:** Collingwood Arts Centre Feasibility Study Phase 2 Report

**Resource 1:** [Collingwood Arts Centre Feasibility Study Phase 1 Report](#)

## 7. Approval

**Prepared By:**

Karen Cubitt, Manager, Culture & Events

**Reviewed By:**

Dean Collver, Director, Parks, Recreation & Culture

**CAO Comments:**

[CAO Comments – endorsement]

# **Collingwood Arts Centre Feasibility Project: Phase II**

## **Final Report**

March 27<sup>th</sup>, 2023





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## Executive Summary

The Town of Collingwood is home to a vibrant arts and culture sector and supportive arts patron community that is seeking the development of an arts centre to call home. In 2021, the Town of Collingwood engaged Nordicity and Giaimo Architects to undertake a feasibility study on the potential to develop one. The final phase one report put forth two size and scope options for the facility and six shortlisted locations for consideration in future research phases.

In August 2022, Nordicity and Giaimo Architects undertook a second phase of their feasibility study to narrow in on the options and determine the appropriate site, size, and scope for such a centre in the Town of Collingwood. Further research and analysis were carried out to test assumptions, assess risks, and make informed recommendations to that end.

### Community Needs

To come to a recommendation on size and scope, Nordicity undertook further consultation, research, and analysis to validate Phase 1 needs, understand regional trends, and assess the likelihood of achieving certain thresholds of activity and economic impact within the facility.

Community consultations confirmed the presence of a sizable artist population in the Town of Collingwood - consisting primarily of independent artists or companies micro-small in size. **The community believes a new arts centre will help cement Collingwood's destination status, no matter the size that is pursued.** However, the majority would have to substantially scale their business activities to be able to afford and fill a large-scale performance venue. **Overall sentiment indicated a preference towards having a smaller ~400 seat main performance facility.** Due to the multi-faceted composition of Collingwood's arts and culture sector, there is a **need for additional creation, education, and rehearsal spaces** to be created alongside performance spaces in any size of new arts facility.

### Regional Arts Facility Trends

Consultations with, and a comparative review of, arts centres located in other regional municipalities across Ontario shed light on **operating realities and trends in the provincial arts facility sector**, for example:

- It's harder to **make a profit on the more popular entertainment acts in performance facilities with smaller seating capacity.** The facility usually has the same costs for the acts but must either charge higher ticket prices or run them at a loss.
  - However, audience behaviours are changing coming out of the pandemic and smaller centres indicated that **attracting name acts can be done at any size if the quality of the facility and audience is there.** Also, there are always more performers than venues available.
- **Municipalities of similar composition to Collingwood tend to develop small-size arts centres**, likely as a result of a smaller potential audience sizes;
- Facilities with **>700 seated capacity performance spaces had a minimum population size of ~130,000;**
- The **size and functionality of both small and large arts centres can vary widely** – from standalone, purpose-built theatres to multipurpose facilities with performing arts

spaces, secondary studios, and a variety of ancillary spaces. It is common for arts centres located in Ontario to have at least 2 performance venues located within their facilities.

- Building multiple performance facilities of varying design enables more accessibility to the space by a range of arts and community groups at various capacities.
- The **average municipal subsidy provided to large size arts centres is more than double those provided to small centres**;
- The actual subsidy provided from the municipality of these smaller centres is near double what is projected for Collingwood in the Phase 1 report;

### Market Sizing

In terms of potential market size, Collingwood has a population of 24,811 as of 2021. **Simcoe County expects Collingwood to grow 66% to over 42,000 by 2051.** With an annual growth rate of around 2%, Collingwood is growing faster than the province of Ontario on average. Collingwood's individual median income skews slightly higher than comparably sized municipalities, indicating that it's home to a **fairly affluent potential local audience**.

Collingwood is home to an additional 6000-9000 residents through the summer months and Thursday-Sunday weekday periods more generally. In relation to other Simcoe County municipalities, **Collingwood sees the largest number of visitors from outside of the Simcoe region annually**, with over 500,000 unique visitors from more than 40km away from Collingwood recorded in 2021.

Still, **the amount of money Collingwood residents would need to spend per year to reach Phase 1 facility projections for Scenario 2<sup>1</sup> (the larger facility) is higher than the town's total statistical annual spend on live performing arts and sport and is likely to continue to be so well into the future.** Even with one third of ticket purchasers coming from out of town, there doesn't seem to be enough disposable income available in or near Collingwood for an arts centre resembling that proposed in Scenario 2's forecasted seat sale numbers and price projections.

**The number of out-of-town ticket buyers required to meet the projected fill capacities is also high for a larger facility.** If 33% of total ticket purchasers were from outside of town, the arts centre would need to ensure that 134 people, or 67 couples, drive into Collingwood from out of town for every performance. Should the arts centre fail to attract 134 people from out of town per performance, the amount of money that local Collingwood residents would need to spend to meet projected fill capacities is pushed even further beyond the town's total live performing arts and sport spend.

**The conclusion is not that the target fill rates are not achievable for the larger facility, just that the larger facility option represents a much higher risk.** Collingwood is unique,

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<sup>1</sup> Note that "Scenario 1" refers to the small sized facility option presented in the Phase 1 final report, and the term "Scenario 2" refers to the large sized facility option presented in the Phase 1 final report.

growing rapidly, and there is great support for an arts centre from the local community. However, the financial risks for the larger facility option should be recognized.

### **Construction Costs**

Construction costs have increased significantly since the initial projections were made in 2021. **2022 capital costs for Scenario 1 are projected to be \$25.2 million to \$34.3 million, and \$49.8 million to \$67.5 million for Scenario 2** based on the Altus Group's Canadian Cost Guide. Because of volatility in the construction industry, experts at Giaimo Architects caution that actual costs can, in practice, vary by up to 30%.

It is also important to consider what is included and what is not included in the projections above. The Altus Group's Canadian Cost Guide provides figures for construction of a physical building only; therefore, any soft costs incurred in this project (for example, architectural fees), and any construction outside of the building (for example, parking structures and landscaping), would be in addition to the above-noted projections. Also, the Town must also consider the costs of furniture, fixtures, and equipment once construction is complete, which could add an additional 10% to costs.

### **Economic Impact**

Economic impact reports related to visitor spending were developed using **the Tourism Regional Economic Impact Model (TREIM)**, a free online data analysis simulation tool developed and offered by the Ministry of Tourism, Culture and Sport. TREIM is capable of simulating tourism-related economic impacts in Ontario jurisdictions (such as the economic impact of specific tourism events, impacts on the supply side by tourism industry sector, and impacts by type of capital project for the chosen region). **Scenario 1 is projected to bring \$1,032,184 in annual visitor spending to Collingwood. Scenario 2 is projected to bring \$3,331,541 in annual visitor spending to Collingwood.** This analysis indicates that a larger facility – comparatively- is likely to have a larger local economic impact than a smaller facility.

In this context it's also necessary to consider the economic priorities of the Town alongside the potential quantitative tourism-related economic impacts. The Town's Economic Development department prioritizes investing in the growth of new residents who invest locally and work from Collingwood rather than growing local GDP. Also, since Collingwood is already a very popular visitor location and congestion in the downtown core is becoming a challenge, the Town prioritizes encouraging increased spending per existing visitor rather than attracting new visitors.

### **Size Recommendation**

The question is what ambition will guide the construction, launch, development, and first 5-10 years of operations at the future Collingwood Arts Centre.

If the Town's vision is to become a **regional magnet** for touring entertainment shows not available within an hour's driving distance, the larger facility is the choice. However, experience shows that in Ontario if the arts facility is operating a performance hall with 700+ seating capacity, the municipality will likely need to be able to supply a \$1 million or more annual operating grant to it. Whatever the composition of the rest of the facility, the financial drivers will mean bringing in as many acts and people as the facility can, whereby the needs of the community get pushed to the smaller spaces.

The other ambition is **more community focused** and would seem to better match the basic economics of Collingwood and the surrounding area. We have learned that a well-designed arts centre with a 400-500-seat main theatre will still attract a lot of touring acts in 2023, especially if organized as part of a regional tour. That would not bring as many people to Collingwood, but if this medium size is a jewel, it will still be an economic draw. Mainly, however, the operational focus would be more evenly distributed on making the arts centre more of a cultural centre for a range of artists and art-active citizens. It would also mean that exceeding the target deficit (from Phase 1 financial projections) is less of a risk.

In sum, although a large arts centre is dearly wanted by a passionate and supportive community, it is a major investment by the community and the Town of Collingwood. Evidence is that **there is a sizable risk that the population of Collingwood, even fast growing as it is, will not fill a big theatre. Based on the analysis there is unlikely to be enough disposable income and enough ticket buyers from Collingwood and the region alone to support this size of a centre.**

The costs to construct arts facilities are going up. We acknowledge that the Town of Collingwood should be able to rely on public and private donors for construction, so that it doesn't need to pay for more than a third of the cost of the facility. It is not clear if a fundraising drive is more doable in the larger scenario, but it would definitely carry higher capital costs. Also, it is clear via pure correlation evidence that larger venues with larger operations need larger annual subsidies from the sponsoring municipality – the risk is just higher for an annual million-dollar deficit even though there is a chance it could be done for less.

**From the perspective of identified risk, Nordicity recommends moving forward with Option 1 – described as “small” in phase one though it’s truly more of a “medium” sized option.** The smaller facility size better aligns with most local users’ needs and desires around cost and capacity. Municipalities of comparable size to Collingwood tend to develop facilities of similar size ranges, likely influenced by their local population. The capital costs for construction, and projected audience and operational scenarios are most feasible from the level of Option 1 would ultimately be best for Collingwood at this time.

### **Scope Recommendation**

Regarding space needs, Nordicity summarizes what it heard from Phase 2 discussions around the need for certain spaces within the facility:

- **At least 2 Performance Spaces** – one should be a more flexible black box with possible seating ranging from 150-250, and a larger space in the realm of 400-500 seats. While Collingwood does have many good qualities that might suggest it could thrive with a larger performance facility, the population demographics don't support the rationale for larger spaces.
- **1-2 Rehearsal Spaces** – with sprung flooring, mirrors, bars, sound equipment, proper lighting, ventilation. At least one purpose-built space, one more multipurpose designed.
- **1-2 Education/Exhibition Spaces** – with appropriate presentation amenities and tech infrastructure to enable different kinds of engagement. Consideration should be given to adding running sinks/water so spaces can also be used as studio space for visual

artists. These spaces should be largely multi-purpose, with the needs of various arts communities in mind.

- **Lobby Space attached to a Café/Restaurant** – to encourage foot traffic, youth and young adult engagement, and community use of the facilities open spaces. Lobby space will double as visual arts exhibition space and should be designed in a way that invites people to congregate and connect.

For details around space square footage, see Section 6.2. It is also recommended that the Town explore additional spaces they already own/operate in downtown Collingwood once a location is selected, to see if there are any additional spaces within walking distance of a new facility that could meet some of these needs to save on square footage.

### **Location Assessment & Next Steps**

The six short-listed sites from Phase 1 have been further assessed and studied by Giaimo through a site selection evaluation framework. Based on this process, the short-list has been narrowed down to two potential sites that both meet the needs of the size, scope, and vision for a new arts centre:

- **48 Ste Marie St:** a new 45,000 sq.ft. arts centre constructed on 35,000sq.ft. parking lot in Downtown Collingwood. The proposed massing includes a newly constructed 2-level 3-storey building. This standalone facility would be adjacent to various downtown amenities including Creative Simcoe Street. At this preliminary feasibility stage, the estimated cost for construction of this facility is \$25M-34M. In addition to this construction cost of the arts centre, there is potential for additional costs to be triggered by this development, such as a new 200 spot parking lot estimated at costing over \$10M depending on being above or below grade.
- **Grain Terminal Redevelopment:** a new 45,000 sq.ft. arts centre integrated with the larger Grain Terminal Redevelopment currently underway by Streetcar and Dream. The arts centre would be on the waterfront with a new large outdoor amphitheater expanding into Millennium Park. The proposed building massing includes 2 levels located within the existing silos building and a 2-level 3-storey new construction addition on the north side of the silos. At this preliminary feasibility stage, the estimated cost for construction of this facility is \$25M-34M.

While the initial intention of this Phase 2 study was to recommend one final site, throughout this study **Giaimo have determined that both sites offer non-comparable approaches, and as such recommends that both be considered further in consultation with the Town, stakeholders, and public to determine which approach is preferred.**

## 1. Introduction

**Collingwood is known for being one of the jewels of Simcoe County along the Georgian Bay.** The Town often finds itself attracting tourists from Blue Mountain, who stop by on their weekend visits and get pulled in by the Town's quaint charm and rich visual heritage. A small but vibrant community, Collingwood is home to a sizable arts and culture sector, which has set up a creative corridor along Simcoe Street. There is also a growing population of remote creative/tech workers. Collingwood's visual arts community is particularly active. This vibrant local arts community has been vying for a new arts centre for many years and in **January 2021 the Town of Collingwood engaged Nordicity and Giaimo Architects to undertake the first phase of a feasibility study on the potential to develop one.**

Our Phase 1 survey found that **Collingwood residents are active culture participants, with over 1600 responses being recorded. Most of these responses were supportive of the development of an arts centre in Town.** The survey results highlighted the community's desire for performance, exhibition, and education/creation spaces in a new arts centre. Community consultations reaffirmed these needs. As such, it was concluded that **an arts centre would be feasible in the Town of Collingwood,** provided certain conditions were met around financial support, community support and threshold audience levels maintained. The final report put forth two size and scale options for the facility and 6 shortlisted locations for consideration in future research phases. The results of the first phase were presented to the Council in October 2021.

**In August 2022, the Town of Collingwood engaged Nordicity and Giaimo Architects to undertake a second phase of their 2021 Arts and Culture Centre Feasibility Study** to determine the appropriate site, size, and scope for such a centre in the Town of Collingwood. Phase two kicked off in August of 2022. Building on the findings of Phase I, the objectives of Phase II are to:

1. **Validate the feasibility of the new arts facility,** including the market, operational, financial, economic, fundraising, and social impact aspects that would underline a recommendation on size and seating capacity.
2. **Assess the feasibility of a short list of sites** and recommend a single site that Council would put forth for any further consultation deemed to be required, and
3. **Determine the target arts disciplines** that would be served by the facility, which would include space for a live performance theatre/music and dance, and public galleries and exhibition space for the visual arts.

In this phase of the project, the focus is on proposing a more defined concept of a centre from the options provided in Phase 1. Nordicity has been engaged to support decision-making around size and scope, while Giaimo will be initiating the site selection process.

### 1.1 Vision for the Collingwood Arts Centre

The project team put forward a preliminary vision for the arts and culture sector in Phase 1 based on local consultations. This vision has not been specifically endorsed by the Town, which simply indicated general acceptance of the Phase 1 report. Nevertheless, the vision presented below provided guidance to the project team throughout the process.



- *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.
- **Complementary to existing arts activities and spaces** – it should provide facilities that have a technical quality and audience capacity that exceeds what is now available in the City.

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 and seasonal visitors;
- **Offer a range of entertainment** which cannot be showcased now in Collingwood for companies, retirees, and other newcomers (including a burgeoning tech sector)
- **Bolster** Collingwood's positioning as a regional hub for arts, culture and entertainment.

## 1.2 The Size, Scope, and Location Options

The main difference between the **two facility options presented in the Phase 1** report can be summarized as follows:

- **Scale:** ranging from housing a main theatre with a 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, though the centre will also house additional spaces ancillary to performance areas. Broadly, the project team has articulated two scenarios at two different capacity levels:

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 limit the pool of acts and performers that could be booked for the venue.
  - a. *Size Estimate:* Approximately 38,000 sq. ft. - 45,300 sq. ft.
  - b. Animated primarily (70-80%) by community-driven activity and 30% “tour”-based (but with the touring rentals priced to subsidize in part the community rentals).
2. **An ~800 Seat Performing Arts Centre:** At this capacity there is a greater opportunity to attract more expensive “name” acts (musicians, shows, productions, performers, comedians, etc.). Ticket sales could generate enough revenue to cover the performer’s fee, while the ticket prices would be in line with other venues’ practices in Southern Ontario. 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 decades.
  - a. *Size Estimate:* Approximately 75,900 sq. ft. - 84,000 sq. ft.
  - b. 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). Thus, it is more dependent on attracting visitors from within an hour of Collingwood.

In either scenario, it is expected the community would use ancillary spaces within the facility for a variety of presentation and artistic creation purposes. The use of the main theatre would primarily be geared to more signature events and performances.

Phase 1 consultations found a slight disconnect between the desires and needs of different members of Collingwood’s arts, culture, and creative communities which led to the options provided above. Some stakeholders 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**. Meanwhile, stakeholders in the creative sectors such as music and digital media production expressed a desire for **a space with the potential to host relatively large audiences (e.g., 800+) and offer high quality infrastructure, serving both the local and tourist audience community**.

While there is contrast between the two visions, they overlap a great deal:

- Both seek a centre capable of responding to both community and audience needs.

- Both envisage high quality performance facilities and spaces for rehearsal and community use.
- Both want the performance spaces to be flexible, so that they gear the space to the expected audience size.

The two different visions are inherent in the two options presented in the Phase 1 report.

The Phase 1 report **put forth six potential locations** for an arts centre in Collingwood:

- Eddie Bush Arena
- Leisure Time Club
- Grain Terminal
- 140 Ste Marie St (Parking Lot)
- 101 Pine St (Parking Lot)
- 48 Ste Marie St (Parking Lot)

### 1.3 Research and Validation Process

From September 2022 to March 2023, Nordicity and Giaimo carried out an additional round of **consultations** with internal and external stakeholders to validate research and assumptions developed in Phase 1, and further assess and select from the site options proposed. Additional **secondary research and further demographic analysis** were also undertaken.

- **Discussions were held with local arts, culture, and creative entrepreneurs and organizations in Collingwood.** Stakeholders represented the dance, theatre, circus arts, film and digital media, visual art, music, and live performance sectors. Through these discussions, visions shared in Phase 1 were validated, and used in the analysis regarding scale and scope.
  - These discussions encouraged local arts companies to reflect on future scenarios with a more complete arts centre concept now available to them. Nordicity encouraged them to critically reflect on how frequently they would/could use the full arts facility - and for each of the two sizes of the main theatre.
  - This enabled stakeholders to make more realistic usage projections and clarify, from their perspective, the must-haves versus nice-to-have features for the future facility. All previously identified aspirations and needs were discussed again with Collingwood community members, to determine whether they still ring true in a post-pandemic environment and within the context of the operating realities presented in Phase 1 report.
- **Meetings were arranged with existing arts facilities in Ontario comparable to the two options put forth for consideration in Phase 1.** We gleaned insight on their operations, their development process, and their key success factors.
  - **Supplementary research and analysis were conducted on arts centres across Ontario** to understand regional trends in art centre development,

operation, and financing. Particular attention was paid to the relationships between size of facilities, size of the general market for these facilities, the kinds of programming presented by these venues, and the operating deficits provided by the municipality they are located within.

- Building off of work completed in Phase 1, Giaimo **further assessed the six short-listed sites in greater detail.**
  - Once the short-listed sites were refined to two based on the site selection evaluation framework, the two sites were examined to confirm that the recommended size, scope, and programming of the Collingwood arts centre could be developed on these two sites and understand the opportunities and challenges of each towards a final recommendation.
- **Meetings with the Town of Collingwood's** engineering, planning, economic development, and infrastructure teams were held to understand the viability of certain sites for redevelopment and the population size and tourism statistics influencing the municipality.
  - At this stage of the project, sub-consultant development specialists have yet to be engaged, and thus expertise in the areas of architecture, cultural heritage, space programming, and design were provided from Giaimo while inputs on engineering, planning, and infrastructure were provided by Town of Collingwood staff.
  - The Town is the property owner for all shortlisted sites, so consultation with their staff was essential in understanding the assessment of the sites.
- One site, the Grain Terminals, already has a revitalization project underway with Streetcar Developments Inc. and Dream Unlimited Corp. selected as the successful proponent by the Town of Collingwood. As such, **consultations were undertaken by Giaimo with Streetcar Developments Inc.** to understand the opportunities and challenges of this specific site.
- Through this process it was determined that the two short-listed sites presented different development, design, and partnership approaches, offering an opportunity to meet the vision of the arts centre in two different ways. Thus, **no one single site is being recommended at this stage given that both are suitable; instead, the opportunities and challenges for each are presented in Section 7.**

## 2. Decision-Making Process

To develop a recommendation as to the size, scope, and site of the future Collingwood arts centre, the answer does not necessarily lie solely in the square footage of the facility/number of seats in the main theatre space. The Town's available capacity does have an important bearing on whether Collingwood can bring in acts that require a revenue base which is easier to obtain with a greater seating capacity. At the same time, economics would dictate at the other end of the scale, more community focused arts groups using the facility would need to pay more for use of the space – or someone would need to pay on their behalf. Also, all sites under review

need to be available for development. All these considerations were explored through this work and are discussed in the report subsections below.

Nordicity and Giaimo's research, analysis and decision-making were based on several key criteria and ultimately determined based on an **evaluation of risk**, as described in the evaluation frameworks developed. There are **caveats** to any such framework. First, not all factors are known or indeed can be known at this stage. Second, the weighting of these factors cannot easily be quantified, and there is no perfectly objective way to assess their relative weight. And finally, some criteria are requirements, absent from which the option itself would be a non-starter.

The frameworks were designed to help Nordicity, Giaimo, and the Town of Collingwood make a logical decision on size, scope, and site location that flows from consideration of all relevant factors.

## 2.1 Size and Scope Evaluation Framework

Nordicity developed an **evaluation framework** to identify the information and process needed to decide on the appropriate scale of an arts centre in Collingwood, based on the two estimates presented in Phase I ("Scenario 1" and "Scenario 2" respectively). The main decision criteria – factors to consider – are described below. The findings from Nordicity's research and assessments are presented in Sections 3 to 6.

**Table 1: Decision-Making Considerations for Size and Scope of Collingwood Arts Centre**

Criteria/Factors	Description
1. Alignment with Collingwood arts and culture sector needs (user needs)	<ul style="list-style-type: none"> <li>Does the centre and proposed size/composition of it have community support?</li> <li>How well does it serve all arts sectors? (e.g., music, performing arts, digital media, visual arts)</li> <li>Does it require the local arts community to substantially increase their activities? What % of events would the community need each size of facility for?</li> <li>What are the necessary features and amenities?</li> </ul>
2. Responsiveness to audience needs	<ul style="list-style-type: none"> <li>How attractive will the facility and its entertainment options be to audiences in the region?</li> <li>How much interest will it draw from the local Collingwood community?</li> <li>Will the facility be accessible to all audience types, regardless of gender, culture, income, and educational background?</li> </ul>

Criteria/Factors	Description
	<ul style="list-style-type: none"> <li>Will the facility draw audiences and arts participation similar to cities of similar size and stature.</li> </ul>
3. Quality and flexibility	<ul style="list-style-type: none"> <li>What activities should be prioritized in terms of space programming?</li> <li>In any trade-offs between quality, flexibility, and space made available, are key priorities still able to be met?</li> </ul>
4. Affordability in terms of access and operation	<ul style="list-style-type: none"> <li>Is there a threshold that cannot be crossed in terms of the level of operating deficits expected to be picked up by the Town?</li> <li>At what level of rental fee would keep community arts and local arts from accessing the facility except very occasionally?</li> <li>To what extent would the facility need to subsidize the rent and service costs for local arts groups to use the facility?</li> <li>Is there a rental cost and ticket price threshold that should not be crossed for facility users and audiences?</li> </ul>
5. Market size and patronage or usage.	<ul style="list-style-type: none"> <li>Does the facility cater to a potential user market that will be able to financially sustain its operation within a feasible operating budget – within a deficit range appropriate for a budget the size of the Town's?</li> <li>Will expected ticket sales be sufficiently strong to support full seasons within the Town's planned operating deficits?</li> </ul>
6. Financing the capital improvement	<ul style="list-style-type: none"> <li>Construction costs are likely to be financed by a private donor raise, Town capital, and other government capital – how reasonable are these fundraising expectations depending on the size and programming of the facility?</li> </ul>

## 2.2 Site Selection Evaluation Framework

Giaimo developed an **evaluation framework** to identify the information and process needed to further narrow-down the six short-listed sites identified in Phase 1. The intention of this assessment had two parts:

1. To review the sites in greater detail, including researching required criteria that was not part of Phase 1,
2. To refine the short-list to a maximum of two viable sites to allow for even further assessment including a massing study.

The main decision criteria – factors to consider – are described below. The findings of this assessment on each site is further described in Section 7.

**Table 2: Location Assessment Criteria used to for initial review of the six short-listed sites**

Criteria/Factors	Description
1. Current Use and Availability for Development	<ul style="list-style-type: none"> <li>▪ From a use and programming perspective, is this site available for new construction or redevelopment in the next 3-7 years? Would acquisition be required? Is the owner and users of the site open to this site being used for a new arts centre?</li> <li>▪ What is the site currently being used for, and how would these uses be impacted?</li> <li>▪ Are there already future development plans underway for the site?</li> <li>▪ If the construction of the arts centre involves the displacement of programming, how feasible is it to reintegrate this programming into the development, or to relocate the programming elsewhere in Collingwood?</li> </ul>
2. Infrastructure and Engineering Requirements	<ul style="list-style-type: none"> <li>▪ From a civil infrastructure and servicing perspective, is development of this site into an arts centre of the size proposed in this Study feasible?</li> <li>▪ What infrastructure and planning studies will be required in future phases of this project to allow for redevelopment?</li> </ul>
3. Site Access	<ul style="list-style-type: none"> <li>▪ How accessible is this site via car, transit, and active transportation?</li> <li>▪ Based on the recommended size of the arts centre outlined in this Study, what considerations need to be taken into account in terms of site access?</li> </ul>
4. Destination and Context	<ul style="list-style-type: none"> <li>▪ Is this site well-suited to meet the community vision of an arts centre that acts as a location landmark and destination?</li> <li>▪ What is the surrounding urban context of this site, and does it align and support the needs of an arts centre? Similarly, does a new art centre align with and support the needs of the adjacent existing building uses?</li> <li>▪ What is the potential “curb appeal” and prominence of this site when considering the design of an arts centre?</li> <li>▪ Based on the recommended size of the arts centre outlined in this Study, what would the resulting massing of the building be on this</li> </ul>

Criteria/Factors	Description
	<p>specific site and does it have the potential to integrate into the context?</p> <ul style="list-style-type: none"> <li>How well does this site allow for the development of an arts centre that meets the Design Guidelines provided in Phase 1 of this Study?</li> </ul>

### 3. What We Heard from the Local Arts Community

In consultation with the local arts community in Phase 2, Nordicity confirmed the presence of a **sizable artist population** in the Town of Collingwood - consisting primarily of independent artists or companies **micro-small in size**. As such, there is a need for **additional creation, education, and rehearsal spaces alongside performance spaces in any size of new arts facility**.

Despite the smaller-scale capacity of Collingwood's arts companies, local artists highlighted that their **Collingwood audiences have been very supportive of the arts**. For example, 100% of a local performing arts organization's ticket buyers chose to keep their money invested in the company through the pandemic. Community interest in the arts in Collingwood was supported by the sizable response rate to the survey launched in Phase 1 of this study.

The community believes a **new arts centre will help cement Collingwood's destination status**, no matter the size that is pursued.

In terms of facility preferences, we heard:

- Nearly all local organizations indicated that they would have to substantially scale their business activities to be able to afford and fill a large-scale performance venue. **Overall sentiment indicated a preference towards having a smaller ~400 seat main performance facility**, especially if the centre is to be positioned as the home of Collingwood's arts sector. The reality is that some local arts groups have had trouble selling out the Simcoe Street theatre at 99 seat capacity – so, even a 400-seat theatre is going to be beyond what they will need. It is better for them to have a relatively smaller theatre, and continued access to existing local venues.
- The **Collingwood Summer Music Festival** could be viewed as an outlier in the community. It has been **increasingly successful** over its 3 years of operation and could likely scale to fill a large-size facility over its 3-day festival period (and they would consider adding days in a new facility). Its ambition is to grow much larger and enhance its economic footprint in the Town of Collingwood, and the festival represents the kind of entrepreneurship that could make Collingwood even more of a destination.
- Concerns were shared around the perception associated with building a large-scale facility in the Town**, when local arts organizations and performance companies, at their current and projected capacity, are unlikely to be able to use them. One stakeholder remarked: *"If the centre is not built to meet the needs of the local arts community, who is it being built for?"* Of course, the answer to that question is for both the local arts community, arts patrons and people who want access to quality



entertainment in Collingwood to consider. The challenge is to accommodate both sets of interests.

- For example, **no matter the size of facility there is universal support for having a flexible secondary performance facility to accommodate smaller scale performances, seating 150-250.**
- And **other venues could be considered for fulfilling the full needs of the community.** For example, the third floor of the library was mentioned as a potential add-on space that can be used for digital media or other educational purposes.

### 3.1 Updated Needs and Aspirations

Community consultations confirmed previously mentioned needs and rationalized usage estimates provided in Phase 1. The table below summarizes the findings of these discussions and is the starting point to the development of a more precise definition of facility needs being undertaken by Giaimo.

**Table 3: Sector Space Needs and Anticipated Usage Projections**

Sector	Spaces Needed	Anticipated Usage
<b>Dance</b>	<ul style="list-style-type: none"> <li>▪ Theatre</li> <li>▪ Public Gathering/Front of House</li> <li>▪ Rehearsal Space</li> </ul>	<p><b>Rehearsal Space:</b> weekly use for dance classes. Around 120-150 days of usage annually.</p> <p><b>Performance Space:</b> Annually or bi-annually for recital performances. Can fill around 500-600 seats per show. Might also be used by dance companies from the wider region.</p>
<b>Theatre</b>	<ul style="list-style-type: none"> <li>▪ Theatre</li> <li>▪ Public Gathering/Front of House</li> <li>▪ Rehearsal Space</li> <li>▪ Education Space</li> <li>▪ Retail and Café Space</li> </ul>	<p><b>Education Space:</b> would use educational spaces for workshops at least 50 days a year.</p> <p><b>Performance Space:</b> Local community would fill at least 72 nights a year. Shows tend to run 1 week at a time and could/would happen monthly.</p>
<b>Music</b>	<ul style="list-style-type: none"> <li>▪ Theatre</li> <li>▪ Public Gathering/Front of House</li> <li>▪ Outdoor Space</li> <li>▪ Retail and Café Space</li> </ul>	<p><b>Performance Space:</b> Desire to draw in name acts and large regional/tourist audiences. Collingwood Summer Music Festival would like to scale and believes they can fill more than 700 seats based on the substantial out-of-Town audiences they have been able to bring in for their festivals date.</p>
<b>Performing Arts</b>	<ul style="list-style-type: none"> <li>▪ Theatre</li> <li>▪ Public Gathering/Front of House</li> </ul>	<p><b>Performance Space:</b> Desire from the wider performing arts community, to use the space on dates that don't compete with dance, music, and formal theatrical calendars. The space would have to be adequately sized to accommodate aerial</p>

Sector	Spaces Needed	Anticipated Usage
		activities. Could run 1-2 showcases a year. Anticipates being able to fill 200-300 seats.
<b>Visual Arts</b>	<ul style="list-style-type: none"> <li>Public Gathering/Front of House</li> <li>Education Space</li> <li>Outdoor Space</li> <li>Retail and Café Space</li> </ul>	<p><b>Public Gathering Spaces:</b> The public gathering spaces should double as exhibition spaces. Walkability and flow should be considered.</p> <p><b>Educations Spaces:</b> Spaces where art education could be taught, or even artistic creation would definitely be used.</p>
<b>Digital Media</b>	<ul style="list-style-type: none"> <li>Theatre</li> <li>Education Space</li> </ul>	<p><b>Theatre Space:</b> Can teach students about performance technology in the control room. Can use black box spaces as soundstages if designed properly. If they incorporate tech elements, this can be a lucrative offer to the regional film sector. Productions can offer 10 days of usage at a time, at higher rates.</p> <p><b>Education Space:</b> 1 day/week for tech education programming.</p>

The community reaffirmed the following facility needs:

- **Performance Space** – with proper accessibility features to enable union crew work. Attention should be given in design to the need for good performer and audience experiences. For performers, consider the quality and ease of use of backstage facilities including dressing rooms, washrooms, a loading dock as well as features of the performance space itself such as high-quality panel system for tech, sound, and acoustic design. For audiences, create comfortable seating, warmth, and a welcoming atmosphere. Performance spaces can also be used for film/live production, especially if proper tech projection and other resources are available.
- **Public Gathering/Front-of-House** – lobby spaces that can double as exhibition and event spaces. Should be attached to a café/restaurant to encourage higher foot traffic, and additional catering space to accommodate corporate/private events as a potential usage. This should be a space that is open to the public, outside of scheduled events, to walk around, explore public art, sit and connect, and enjoy refreshments. Box office space would also be appreciated.
- **Rehearsal Space** – For performance sectors such as dance, theatre, music, circus arts, and drama to teach and practice in. Secondary usages can include exercise/fitness classes. Interviews indicated anecdotally that there's a growing young family population in Collingwood, with many local arts education companies seeing increased demand. They indicated a need for additional space.
- **Education Space** – For tech and visual arts uses. Could be used as artist studio space, equipped with proper wash facilities, or live broadcast areas, equipped with cameras, projectors, microphones, and streaming equipment.

- **Outdoor Space** – For people to gather. At minimum, the exterior design of the facility should be done so thoughtfully in a way that makes Collingwood’s arts and culture sector feel like they see themselves in it.
- **Retail/Café Space** – Seen as key to attracting younger audiences to the space. Having hospitality spaces encourages people to come to the centre and congregate, increasing its vibrancy and the chances that people will be inspired to come in and see a show, the art gallery in the lobby, or take part in an early morning yoga class.

### 3.2 Space Programming

As a result of these discussions, we can prioritize some of the programming needs from the options provided in Phase 1. The yellow highlighted rows were those moved up into the “must have” category as a result of recent community discussions.

**Table 4: Updated Space Programming Needs**

Space Programming	
Must Have Spaces	
Public Gathering Areas	
Front-of-House	
Theatre 1 (400-500 capacity, fixed seating)	
Theatre 2 (150-250 capacity, flexible seating)	
Administration	
Theatre Support Spaces	
Studios/Classrooms	
Services/Circulation	
Additional office and catering	
Retail and market space	
+ Should Have Spaces	
Outdoor component	
+ Could Have Spaces	
Additional gallery and studios	
Apartment for artists	

The primary changes to the programming proposed in Phase 1 include the addition of a secondary theatre space of smaller capacity, and the consideration of catering and retail spaces as must have spaces within the future arts facility.

## 4. Comparative Facility Analysis

Nordicity conducted research on 10 arts centres located across Ontario where half represent “large” facility sizes (700+ seats) and half represent “small” facility sizes (~400+ seats). See

Appendix A for the detailed breakdown. These centres were profiled based on available data on their community demographics, facility composition, and operating budget. These centres were selected for a range of reasons, from recommendations and examples put forth by stakeholders consulted in Phase 1 and 2 of this feasibility study process. At this stage, the actual arts facility for Collingwood is still at a fairly high concept level.

## **4.1 Large Arts Centres**

Large arts centres were defined as facilities of more than 60,000 sq ft. containing at least one >700 -seat theatre. Nordicity profiled the following centres:

- FirstOntario Performing Arts Centre, St. Catharines
- Burlington Performing Arts Centre, Burlington
- St. Lawrence Centre for the Performing Arts, Toronto
- The Rose Theatre, Brampton
- Living Arts Centre, Mississauga

The FirstOntario Performing Arts Centre and Burlington Performing Arts Centre are most like the “large” size facility option put forth in the Phase 1 report, and are the newer facilities explored, opening in 2015 and 2011 respectively. We provide case studies on these facilities in the section below.

### **Case Study 1: FirstOntario Performing Arts Centre, St. Catharines**

The [FirstOntario Performing Arts Centre](#) was developed to spur an artistic, cultural, and economic renaissance in downtown St. Catharines. Since 2015, the facility has played a significant role in stimulating the municipality’s creative economy. The facility offers 9 rental spaces, 5 of which can be used as presentation spaces. Its main theatre features 770 seats, with a smaller recital hall able to accommodate 304 seats, a black box theatre with 400-person (standing) capacity and a 200-seat indie film house.

#### **Operation & Finance**

The building is owned by the City of St. Catharines. An independent municipal board was established in 2020 to run the facility. The FirstOntario Performing Arts Centre’s annual operating budget is between \$6-\$7 million, made up with a 30% standing budget from the municipality, revenue from facility rentals, and a partnership with Brock University which contributes financially to operations annually in recognition of the usage of space for teaching and performances. They are an IATSE (union) venue.

#### **The Business Model**

The FirstOntario Performing Arts Centre is an active presenter and film programmer. About half the events that take place in the facility are at their own risk, and the other half are from external rental uses. Most presentations and clients represent professional programming.

Community uses are largely concentrated outside the main performance stage and consist of workshops and other events.

The FirstOntario Performing Arts Centre works with a circuit of venues in Milton, Brampton, and Peterborough to attract touring acts. They will also incubate emerging local artists, providing their facility spaces and promotional services and share revenue from performances.

The facility draws in a sizable regional audience, with just about half coming from St. Catharines. As the neighbour of two municipalities with strong tourist economies, Niagara-on-the-Lake and Niagara Falls, the FirstOntario Performing Arts Centre differentiates themselves by appealing to local and regional audiences and investing heavily in sustaining these audience relationships.

### **Case Study 2: Burlington Performing Arts Centre, Burlington**

The [Burlington Performing Arts Centre](#) (BPAC) is a charitable, not-for-profit organization. The organization acts as a presenter, a cultural developer, an educator, and a community hub. The facility features a 720-seat Main Stage and a black box Community Studio Theatre that allows for 170-seats in a cabaret set-up and 225- seats theatre style. The facility also offers an outdoor plaza space.

#### **Feasibility Study and Development Process**

The City of Burlington went through a similar feasibility study process to Collingwood back in the 2000s to determine the appropriate scope and scale of the facility. A consulting firm was engaged to establish whether there would be support for the facility from the local community. They provided building designs and operating estimates/projections which evolved as the project moved into execution, construction, and full-time operation.

To support the construction of the centre, a fundraising and capital campaign was launched. It raised \$11-12 million. In addition, the facility received a federal grant and some support from the City of Burlington. A recruitment consultant was onboarded to find an experienced arts centre Executive Director to run the operations successfully. The Burlington Performing Arts Centre is now served by its fourth, longest-serving Executive Director, Tammy Fox.

#### **Operation & Finance**

The centre is operated, managed, and run by a not-for-profit organization separate from the City of Burlington with its own employees. Both the not-for-profit and the City of Burlington have shared obligations to repair, maintain, and replace capital items in the centre.

The centre receives about \$1 million annually from the City of Burlington, some of which goes to capital projects. Their operating budget is around \$3-4 million. Other revenue sources come from federal and provincial grants, sponsorships from businesses and/or philanthropists, ticketed events, and facility rentals.

#### **The Business Model**

The Burlington Performing Arts Centre is run like a business. BPAC presents a diverse season of professional entertainment, featuring approximately 70-80 performances each year in every genre, as well as an education series, festivals, workshops and community engagement events. BPAC is also a rental facility, working with local community groups, promoters, dance

competitions, corporate events and more. The majority of their audiences are local, while about 20% drive in from outside of the City of Burlington.

## **4.2 Small Arts Centres**

Small arts centres were defined as facilities of less than 60,000 sq ft. containing performance spaces of less than 700-seats. Nordicity profiled the following centres:

- Stockey Centre for the Performing Arts, Parry Sound
- Hamilton Family Theatre, Cambridge
- Young Centre for the Performing Arts, Toronto
- Five Points Theatre, Barrie
- Orillia Opera House, Orillia

The Stockey Centre and Orillia Opera House are located in municipalities most comparable in population size to Collingwood. It is not a definitive parameter, but quite relevant to this research. We provide case studies on these facilities in the section below.

### **Case Study 3: Stockey Centre, Parry Sound**

The [Charles W. Stockey Centre for the Performing Arts](#) is in Parry Sound, Ontario, Canada. It houses a 400-seat Festival Performance Hall and the Bobby Orr Hall of Fame. The Stockey Centre sits on a 3.5-acre waterfront site overlooking beautiful Georgian Bay.

#### **Operation & Finance**

The Stockey Centre is a municipally owned facility that is operated as a separate non-profit by 4 municipal staff: a manager, a marketing and program coordinator, curator, and a technical director. There are 11 other part time staff members who work in the Box Office, Hospitality, Custodial, and Technical Support. Through the Northern Ontario Heritage Fund, they have been able to secure a yearly intern for the Bobby Orr Hall of Fame.

In all, they run a \$1.5-2 million operation, with an annual deficit of just under \$300,000. The Bobby Orr Hall of Fame is housed inside the facility, as well as the Visitor Information Centre for the West Parry Sound area. They received \$500,000 one-time funding from FEDNOR for the Bobby Orr Hall of Fame Redesign Project. The Stockey Centre receives program funding from the Department of Canadian Heritage through the Canadian Arts Presentation Fund annually.

#### **The Business Model**

The Stockey Centre is largely a rental venue, with the centre itself presenting around 20-25 events per year. In 2019, they were booked 260 days, with multiple events happening at different facilities in the building each day. They work together with a group of northern Ontario venues to pull tours together. The centre is also home to the Festival of Sound summer music festival, which runs over three weeks in the summer and draws in significant economic impact to the Town.

The Festival Performance Hall is multipurpose and can be flipped into a banquet style hall for events and weddings. From May to September the facility is quite busy with weddings.

Most of the Stockey Centre's audiences come from the region, defined as anywhere within 100 kilometers of the centre. While Parry Sound has a small permanent population of 7000, from May-September population grows to include many seasonal residents.

#### **Case Study 4: Orillia Opera House, Orillia**

One of Orillia's oldest buildings and formerly the City Hall, [the Orillia Opera House](#) is a historical icon in the community. The facility features two performance spaces, one with 677 and the other with 100-person seating capacity, a lobby, and a café.

##### **Operation & Finance**

A municipally owned and operated non-profit venue, the Orillia Opera House is supported financially by the City of Orillia with an annual contribution of \$500,000 (40% of their \$1.25 million operating budget). Much of their municipal funding goes towards financing the physical building itself, in terms of maintenance and repairs. The facility also receives revenue from ticket sales, rentals, and provincial/federal grants.

##### **The Business Model**

Programming activities are determined to ensure financial success for the venue. The facility today operates as a performing arts space, a venue for classes, camps, seminars, and events, and draws audiences in from around the region. The Orillia Opera House also produces and tours its own shows in the summer season. By using the space as a multipurpose venue, the theatre aims to promote community awareness of the facility's potential.

The main programming offered by this facility is in the summer season, targeted at the 55 plus age group as this group has the most disposable income. The venue also partners within the community. Of note are partnerships with the Mariposa Folk Festival, Mariposa Arts Theatre, and Orillia Arts.

### **4.3 Key Findings and Regional Trends**

Findings from the comparative analysis activities are summarized in the tables below.

**Table 5: Comparative Analysis of the Community Demographics and Financials of Large and Small Arts Centres in Ontario, against Collingwood<sup>2</sup>**

Category of Venue	Large	Small	Collingwood
<b>Average local population</b>	425,000 (St. Catharines, Burlington, Brampton, Mississauga)	81,650 (Parry Sound, Cambridge, Barrie, Orillia)	24,811
<b>Average individual median income</b>	\$40,600 (St. Catharines, Burlington, Brampton, Mississauga)	\$39,400 (Parry Sound, Cambridge, Barrie, Orillia)	\$42,000
<b>Operating budget range</b>	>\$5 million	<\$5 million	\$1.1-1.5 million <sup>4</sup>

**Table 2: Comparative Analysis of the Composition and Characteristics of Large and Small Arts Centres in Ontario**

Category of Venue	Large	Small
<b>Average # of spaces available to rent</b>	5 – mix of performance space, multipurpose studio space, and lobby/ancillary spaces	5 – mix of performance space, multipurpose studio space, and lobby/ancillary spaces
<b>Average # of performance spaces available to rent</b>	2 - The larger performance spaces ranged in capacity from <b>719-1300</b> seats, the smaller ones ranged from <b>120-499</b> seats.	2 - The larger performance spaces ranged in capacity from <b>200-677</b> seats, the smaller ones ranged from <b>100-230 seats</b> .
<b>Other observations</b>	<ul style="list-style-type: none"> <li>Common for these centres to house multiple performing spaces.</li> <li>A number of these centres were built to rejuvenate/revitalize their municipalities.</li> </ul>	<ul style="list-style-type: none"> <li>Small arts centres can be found in municipalities of all population sizes, but it is more common to find that smaller municipalities have smaller performing arts facilities.</li> </ul>

<sup>2</sup> Based on 2020 and 2021 census numbers, and available financial information from interviews and publicly available annual reports. Toronto was excluded as an outlier from calculations.

<sup>3</sup> Based on figure provided in the economic model submitted in Phase 1 of the Collingwood Arts Centre Feasibility study. This figure was the same at both size ranges provided.

<sup>4</sup> Based on figures provided in the economic model submitted in Phase 1 of the Collingwood Arts Centre Feasibility study.



Category of Venue	Large	Small
	<ul style="list-style-type: none"> <li>Centres at these sizes can attract more professional talent as they can afford to pay the higher wages.</li> </ul>	<ul style="list-style-type: none"> <li>The number and types of spaces available in small arts centres varies widely.</li> <li>Small centres are commonly operated as not-for-profits or are directly operated by the municipality. Focus is on smaller scale local uses.</li> <li>For municipalities with similar population sizes to Collingwood, the operating budget range is \$1.25-1.8 million.</li> </ul>

The key findings from the comparative facility analysis include that:

- **Municipalities of similar composition to Collingwood tend to develop small-size arts centres**, likely as a result of a smaller potential audience size;
- **Facilities with >700 seated capacity performance spaces had a minimum population size of ~130,000;**
- The **size and functionality of both small and large facilities can vary widely** – from standalone, purpose-built theatres to multipurpose facilities with performing arts spaces, secondary studios, and a variety of ancillary spaces;
- The **average municipal subsidy provided to large size arts centres is more than double those provided to small centres;**
- The actual **subsidy from the municipality of these smaller centres is more than \$200,000 more than what is projected for Collingwood;**
- **It is common for arts centres located in Ontario to have at least 2 performance venues** located within their facilities; and,
- The Collingwood population's **individual median income skews slightly higher**, indicating that it's home to a fairly affluent potential local audience. However, in view of the population difference, this advantage may not be as substantial.

The key findings from external interviews with Ontario arts centres include that:

- **Partnerships and sponsorships** with local organizations, festivals, and education institutions are an impactful way to sustain revenue for the venue.
- It's **harder to make a profit on the more popular acts in performance facilities with smaller seating capacity – they usually have the same costs for the acts, but either must charge higher ticket prices or run them at a loss.** This basic economic dilemma would inhibit the booking of higher calibre acts.
  - However, smaller centres indicated that **attracting name acts can be done at any size if the quality of the facility and audience is there.** For example, the Stockey Centre has been able to attract performers such as Johnny Reid and

Jann Arden despite their smaller facility size, though irregularly. The Stockey Centre's audiences were willing to pay slightly higher prices for tickets to higher calibre events.

- The fact is that there are always **more performers than venues available**. The smaller venues are less competitive in going after larger name acts, but they can also band together to book a string of venues to make it worthwhile for the artists. That doesn't overcome a seat advantage, but it attenuates it.
- On the flip side of the coin, **larger performance facilities have higher rental rates**, which can prove financially inaccessible for smaller scale performance companies like those in Collingwood.
- Consultation participants also noted that **audience and performer behaviours are changing coming out of the pandemic**, with some lingering hesitancy to return among the 55+ crowds (which also make up the majority of performing arts audiences) and a somewhat **increased interest in smaller, more intimate performances**.
- Building **multiple performance facilities of varying design (e.g., some purpose-built and some flexible/multipurpose) enables more accessibility to the space by a range of arts and community groups at various capacities**. In some facilities like the Burlington Performing Arts Centre, larger performance venues have been designed with balcony spaces that can be closed off for smaller scale performances.

## 5. Validation through Market Sizing

This section will show that for the facility to achieve its financial targets, it needs to generate ticket sales roughly equivalent to the forecasted amounts provided in the Phase 1 report. This section takes a hard look at the likelihood of achieving those targets by using publicly available statistical data related to disposable income and average annual spend on arts activities.

Collingwood has a population of 24,811 as of 2021. Simcoe County expects Collingwood to absorb 9% of the region's growth in the next 30 years, growing 66% to over 42,000 by 2051.<sup>5</sup> With an annual growth rate of around 2%, Collingwood is growing faster than the province of Ontario on average.

Collingwood is also home to a sizable seasonal population, adding between 6000-9000 residents through the summer months and Thursday-Sunday weekday periods more generally.<sup>6</sup> Collingwood also sees the largest number of visitors from outside of the Simcoe region annually, with over 500,000 unique Canadian visitors from over 40km away from Collingwood recorded in 2021.<sup>7</sup>

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<sup>5</sup> <https://www.simcoe.com/news-story/10669888-by-the-numbers-collingwood-population-expected-to-reach-42-000-in-the-next-30-years/>

<sup>6</sup> Town of Collingwood Official Plan 2019.

<sup>7</sup> Environics Analytics PRIZM Data.

The population size of Collingwood and near Collingwood is quite relevant to the size and scale of the new facility. It is clearly a growing and vibrant community with a high interest in the arts. **But does it serve a potential audience large enough to support the Phase 1 estimates made of seats sold per year to meet a target of operating deficit size that is compatible with the budget for the Town of Collingwood?** Recall that the Phase 1 financial projections estimated the facility would require a \$250,000 subsidy from the Town per year.

With that question in mind, we looked at the **disposable income Collingwood residents annually spend on live performing arts and sport and matched it against the number of tickets sold at events at a market ticket price** – adjusting for the expected number of patrons to come from outside the Town of Collingwood. We also adjusted to the fact that there would be more spending with a new arts facility attraction, and that Collingwood is growing quickly.

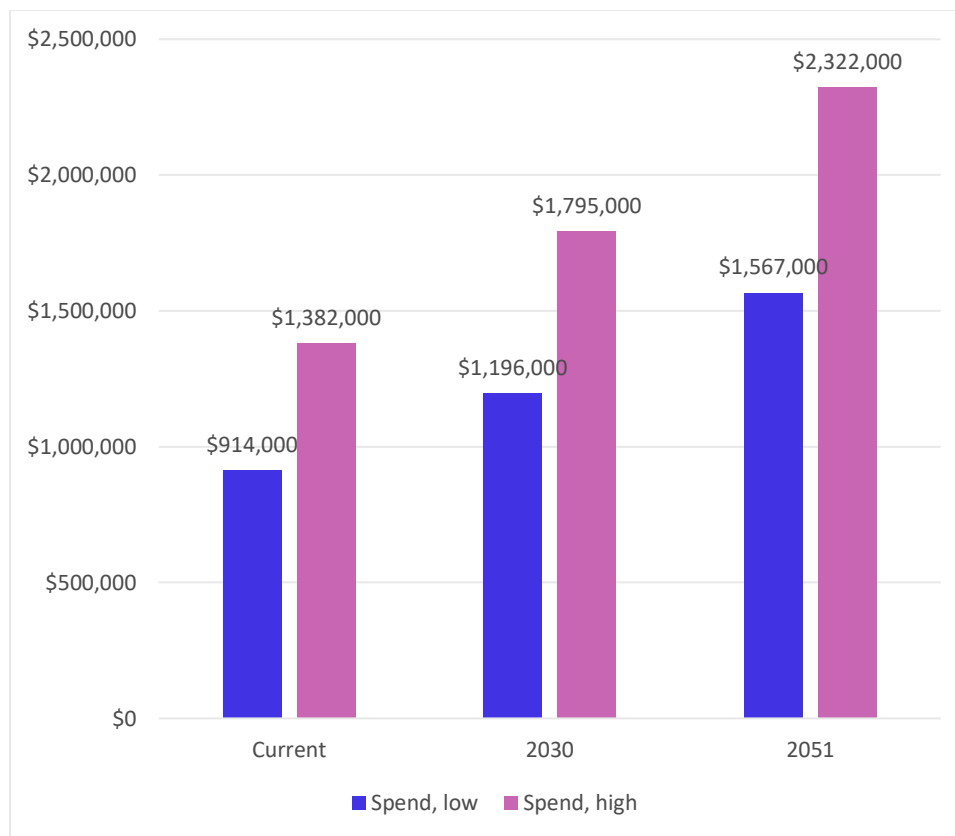
Households in Canada spend an average of 73.2% of their total income; of that amount, **0.14% is spent on “live performing arts and sport events” in population centres under 100,000 people. This figure increases to 0.16% in population centres over 100,000 people.**<sup>8</sup> The reasons for this increase conceivably relate to the increased availability of performing arts and sporting programming in larger population centres, and thus more opportunity to spend on it. Accordingly, we turned to the larger figure (0.16%) in the analysis, since the advent of the arts centre would mean a definite upgrade in options for Collingwood residents.

Collingwood’s **current total spend** on live performing arts and sport was calculated based on its current population. The town’s **future projected spend** on live performing arts and sport were calculated using the estimated population in the years 2030 (30,000) and 2051 (42,000), according to the Town of Collingwood Community Profile 2021 and [Simco.com](https://www.simco.com) respectively. As reasoned above, **we calculated the projected future spend at the rate of 0.16% of household income.** The results are presented in the chart below.

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<sup>8</sup> Statistics Canada Survey of Household Spending, 2015

**Figure 1: Collingwood's Current and Future Spend on Live Performing Arts and Sport<sup>9</sup>**

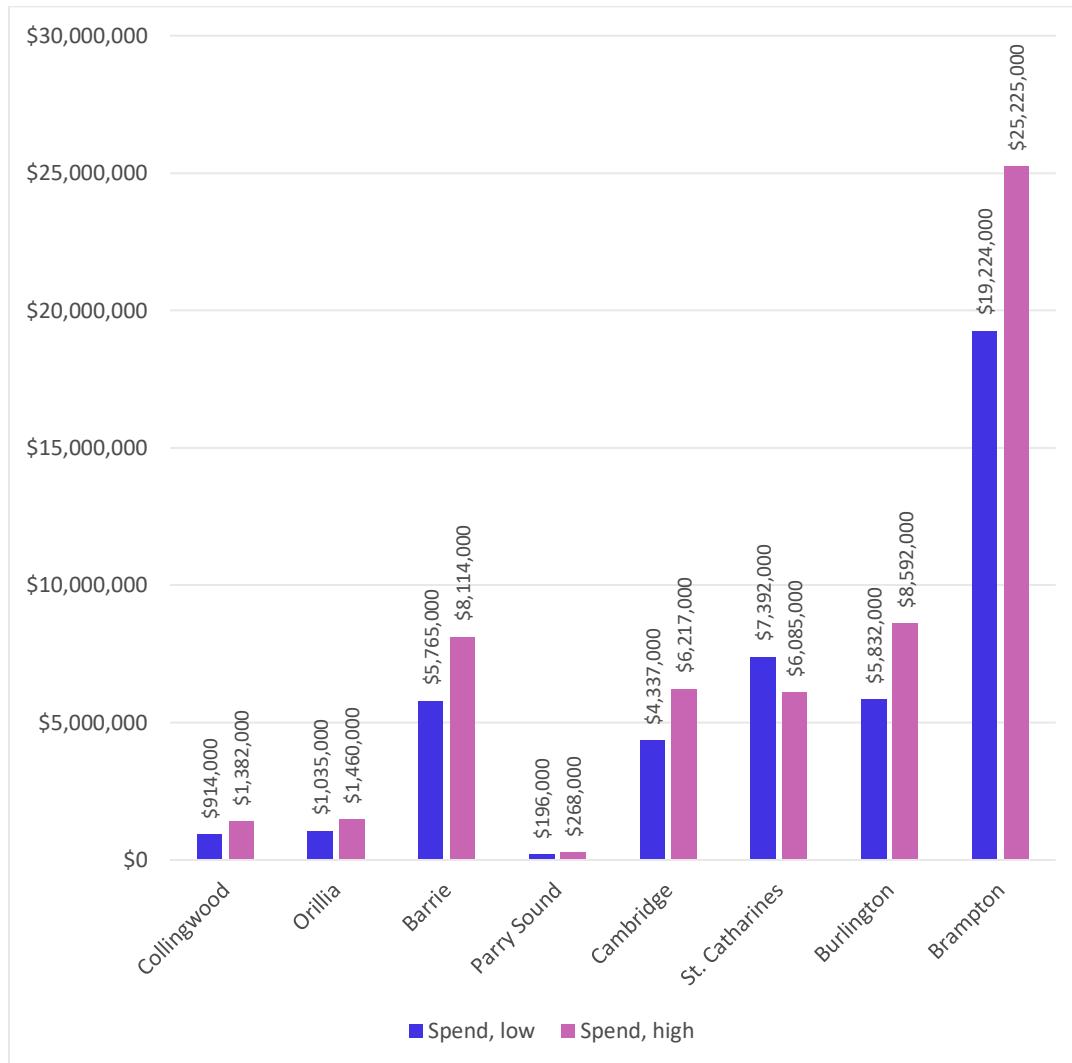


A comparison of Collingwood's current live performing arts and sport spending to that of other jurisdictions with arts centres is shown in the chart below.

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<sup>9</sup> Note that annual total spend on live performing arts and sport is presented in this chart as a range because it is calculated using household income data published by Statistics Canada, which provides the number of households in a given jurisdiction that fall within various income ranges.

**Figure 2: Current Arts and Sport Spending of Ontario Municipalities**



As can be seen in the chart above, Collingwood's total spend on live performing arts and sport is approximately equal to that of Orillia, given their similar population sizes. Larger centres, like Brampton, St. Catharines, and Brampton have a higher spend because of their larger population sizes.

In Phase 1 of this feasibility study, the distribution of concert hall events anticipated after **5 years of operation** (i.e., when the facility is fully up and running in terms of program offerings), as well as the anticipated fill capacity for each type of event, was noted as follows:

**Table 7: Ticketed and community event usage forecast for the Collingwood Arts Centre – Phase 1**

	Scenario 1 (400 seats)		Scenario 2 (800 seats)	
	Number of Events	Capacity Fill	Number of Events	Capacity Fill
<b>Community Events<sup>11</sup></b>	130	58%	98	29%

Using these event distributions and capacity fill rates, the number of tickets that would need to be sold annually 5 years into operation was calculated as follows:

**Table 8: touring vs. community event ticket sales projections for the Collingwood Arts Centre**

	Scenario 1 (400 seats)	Scenario 2 (800 seats)
Ticketed Event Tickets	16,800	52,800
Community Event Tickets	30,008	22, 736
<b>Total Tickets Per Year</b>	<b>46,808</b>	<b>75,536</b>

We then calculated the corresponding local expenditure needed to meet these projections. Community event price assumptions for tickets were modeled at a price of \$10, while Ticketed (or touring) events were modeled using a ticket price of \$65. We realize that the ticket prices for touring events – all in, including taxes and fees – would likely be around \$95 at today's prices, while the local event price at \$10 might be on the low side as well. However, for the purpose of the analysis, the choice of lower numbers is conservative.

**Consideration was also given to the proportion of ticket buyers who would likely be attracted from outside Collingwood.** Research and consultations indicate that the proportion of out-of-town buyers will be higher in the larger facility than the smaller facility. It was therefore assumed that one-sixth (17%) of buyers would be from out of town in Scenario 1, while one-third (33%) of buyers would be from out of town in Scenario 2.

One might argue that premium acts would draw plenty of regional residents who would drive there for the show – maybe accounting for half the box office receipts on some nights. Again,

<sup>10</sup> Ticketed events, per Nordicity's Phase 1 report, are defined as shows presented by large (relatively speaking), commercial organizations (e.g., a Live Nation concert, a touring show, comedy etc.).

<sup>11</sup> Community events, per Nordicity's Phase 1 report, are defined as shows presented by local independent arts and culture organizations (e.g., Theatre Collingwood performance).

different assumptions could be made, but in general terms, on a year-round basis for Collingwood, this ratio seemed to be reasonable.

According to data provided in the [Town of Collingwood 2022 Community Profile](#) (informed by Environics Analytics), this number of projected visitors falls well within the number of visitors the area receives in an average year. The total **number of unique people who visit annually** is approximately 600,000 (with ~500,000 of these people living more than 40 KM away from Collingwood), and the total number of **annual visits** to Collingwood in 2019 was over 8 million. According to the Profile, these are high visitor statistics when compared to surrounding areas; **Collingwood sees a larger number of total visitors annually compared to surrounding communities in Simcoe County.**

Furthermore, many of the **types of visitors** Collingwood attracts, according to the Profile, have preferences and characteristics that indicate likelihood to purchase tickets to shows and events at a new performing arts centre. For example, "suburban middle-aged families," "rural older families," "affluent established families," "countryside families," and "exploring country couples" accounted for some 217,000 visitors to Collingwood in 2021, and each of these visitor types show **some affinity for cultural events and/or performing arts**. Collingwood also attracts other visitor types, and though their profile details were unavailable at the time of writing this report, at least some of them are likely to show some affinity for cultural events and/or performing arts. All told, the **number** of visitors as well as the **types** of visitors that Collingwood attracts annually can support the out-of-town ticket purchase projections provided above.

The total spend required by Collingwood ticket-buyers was calculated and compared to Collingwood's statistical spend on live performing arts and sport outlined above. The following table models the local expenditure needed for Scenario 1.

**Table 9: Annual Ticket Spend Model, Scenario 1**

<b>Scenario 1 Annual Ticket Spend Model (17% out of town ticket buyers)</b>	
<b>Community Events</b>	
Ticket price	\$10.00
Collingwood Ticket Buyers	25,007
Collingwood spend	\$250,069
<b>Ticketed Events</b>	
Ticket price	\$65
Collingwood Ticket Buyers	14,000
Collingwood spend	\$910,000
<b>Total Collingwood Spend Needed</b>	<b>\$1,160,069</b>

Scenario 1 Annual Ticket Spend Model (17% out of town ticket buyers)	
% of Collingwood Live Performing Arts and Sports Spend, 2021 <sup>12</sup>	84%
% of Collingwood Live Performing Arts and Sports Spend, 2030	65%
% of Collingwood Live Performing Arts and Sports Spend, 2051	50%

With 17% of ticket buyers from outside of Collingwood, town residents would need to spend a total of \$1.16 million per year to ensure events at the arts centre reach the projected fill capacities that sustained the target annual subsidy. This requirement is within the total annual live performing arts and sports spend of Collingwood's residents and in the near term a large proportion of the total spend in this category of disposable income. As shown, it will decline substantially in 2030 and 2051 as the Town grows.

Additionally, the number of out-of-town ticket purchasers required to meet the projected fill capacities is reasonable to achieve. If 17% of total ticket purchasers are from outside of town, the arts centre would need to ensure that 43 people, or approximately 22 couples, drive into Collingwood from out of town for every performance.

The following table models the local expenditure needed for Scenario 2.

**Table 10: Annual Ticket Spend Model, Scenario 2**

Scenario 2 Annual Ticket Spend Model (33% out of town ticket buyers)	
<b>Community Events</b>	
Ticket price	\$10
Collingwood Ticket Buyers	15,157
Collingwood spend	\$151,573
<b>Ticketed Events</b>	
Ticket price	\$65
Collingwood Ticket Buyers	35,200
Collingwood spend	\$2,288,000
<b>Total Collingwood Spend Needed</b>	
	<b>\$2,439,573</b>
% of Collingwood Live Performing Arts and Sports Spend, 2021	176%
% of Collingwood Live Performing Arts and Sports Spend, 2030	136%
% of Collingwood Live Performing Arts and Sports Spend, 2051	105%

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<sup>12</sup> These percentages are calculated using the higher end of the live performing arts and sport spend ranges outlined earlier in Section 3.2.2.



It can be noted that **the amount of money Collingwood residents would need to spend per year to reach Phase 1 facility projections for Scenario 2 is higher than the town's total annual live performing arts and sport spend and is likely to continue to be so well into the future.** Even with one-third of ticket purchasers coming from out of town, there doesn't seem to be enough local disposable income available in Collingwood for an arts centre resembling that proposed in Scenario 2's forecasted seat sale numbers and price projections.

The number of out-of-town ticket buyers required to meet the projected fill capacities is high for a larger facility. If 33% of total ticket purchasers were from outside of town, the arts centre would need to ensure that 134 people, or 67 couples, drive into Collingwood from out of town for every performance (ticketed and community). Should the arts centre fail to attract 134 people from out of town per performance, the amount of money that local Collingwood residents would need to spend to meet projected fill capacities is pushed even further beyond the town's total live performing arts and sport spend.

Survey data gathered in Phase 1, as well as research and consultations, indicate that in the best case, 5% of a local population can be retained as a regular visitor to an arts organization. In the context of this project, let us assume that 3% of the local population be retained as regular visitors to the arts centre. Defining "regular visitor" as a **monthly** ticket-purchaser, the remaining tickets to be sold annually for ticketed events (i.e., touring events) after out-of-town purchasers and regular visitors are taken out of the equation were calculated using today's population statistics as well as future population statistics and are shown in the table below.

**Table 11: Local Tickets to be Sold Annually for Ticketed Shows (after Monthly and Out-of-Town Purchases)**

Year		Scenario 1	Scenario 2
2021	Population	24,811	24,811
	% of population attending monthly	3% (744)	3% (744)
	Total # of tickets to be sold for Ticketed events	16,800	52,800
	Tickets purchased annually by regular visitors	8,932	8,932
	<b>Remaining local tickets to sell annually</b>	<b>5,012</b>	<b>26,444</b>
2030	Population	30,000	30,000
	% of population attending monthly	3% (900)	3% (900)
	Total # of tickets to be sold for Ticketed events	16,800	52,800
	Tickets purchased annually by regular visitors	10,800	10,800
	<b>Remaining local tickets to sell annually</b>	<b>3,144</b>	<b>24,576</b>
2051	Population	42,000	42,000
	% of population attending monthly	3% (1260)	3% (1260)
	Total # of tickets to be sold for Ticketed events	16,800	52,800
	Tickets purchased annually by regular visitors	15,120	15,120
	<b>Remaining local tickets to sell annually</b>	<b>0</b>	<b>20,256</b>

If 3% of Collingwood's local population become monthly visitors to the arts centre, only about 5,000 additional local tickets for touring acts would need to be sold annually in Scenario 1, a goal very achievable. This figure more than quintuples in Scenario 2 to over 26,000 local tickets. Over time as the population grows, the attendance requirement decreases for both scenarios but the requirement remains extremely high for Scenario 2: in 2030, only about 3000 additional local tickets need to be sold for Scenario 1, while over 24,000 are required for Scenario 2; and finally, in 2051, monthly visitors and out-of-town ticket purchasers could feasibly fill the house touring acts to the required threshold in Scenario 1 without having to rely on selling additional tickets to other locals. Scenario 2, however, would still require more than 20,000 additional local tickets to be sold annually.

**The conclusion is not that the target fill rates are not achievable for the larger facility, just that Scenario 2 represents a much higher risk.** Collingwood is unique, growing rapidly, and there is great support for an arts centre from the local community. However, the financial risks for the larger facility option should be recognized.

## **5.1 Facility Costs and Other Financial Considerations**

Nordicity reviewed the forecasted cost to build a new performing arts centre in Collingwood, potential sources of capital to pay for the construction, and the economic impact of each facility proposed to base fiscal risk assessments on up-to-date figures.

### **5.1.1 Construction Costs**

Construction costs have increased significantly since the initial projections were made in 2021. According to the Altus Group's 2022 Canadian Cost Guide, which provides the approximate cost per square foot for various types of construction in numerous locations around the country, costs in 2022 drastically increased because of inflation, supply chain volatility, labour shortages, and more. Construction costs are likely to continue to increase in the future, though the rate at which costs will increase is unknown.

The Altus Group's Guide provides both a low-end per-square-foot cost estimate and a high-end per-square foot cost estimate. Research and consultations indicate that the community is calling for design excellence in the construction of a new Arts Centre, meaning the new facility should have higher-quality amenities (both for audiences and for performers), acoustics, and aesthetic touches. Therefore, it is reasonable to assume that the higher-end estimates would be more in line with what the Town might expect to spend.

2022 capital costs for Scenario 1 are projected to be \$25.2 million to \$34.3 million, and \$49.8 million to \$67.5 million for Scenario 2. The table below shows the cost projections for both scenarios along with the year-over-year percent increase. Because of volatility in the construction industry, experts at Giaimo Architects caution that **actual costs can, in practice, vary by up to 30%.**

**Table 12: Comparison of Construction Cost Estimates, 2021 and 2022**

Scenario 1 (400 seats)				Scenario 2 (800 seats)		
	2021	2022	% Increase	2021	2022	% Increase
<b>Low</b>	\$16.4M	\$25.2M	54%	\$32.0M	\$49.8M	56%
<b>High</b>	\$25.2 M	\$34.3M	36%	\$49.1M	\$67.5M	37%

While slightly different, construction estimates for both Scenario 1 and Scenario 2 increased significantly in one year. Whether these estimates are entirely accurate or indicate any kind of steep climb in the future is obviously debatable. However, it is important to start with a realistic picture of costs.

It is also important to consider **what is included and what is not included** in the projections above. The Altus Group's Guide provides figures for construction of a physical building itself; therefore, any soft costs incurred in this project (for example, architectural fees), and any construction outside of the building (for example, parking structures and landscaping), would be in addition to the above-noted projections. Also, the Town must also consider the costs of furniture, fixtures, and equipment once construction is complete, which could feasibly add an additional 10% to costs.

### Sources of Capital to Pay for Construction

A high-class, high-quality arts centre is certainly the expectation of Collingwood. The Town has every right to aspire to the best in keeping with the Town in general and in keeping with the ambitions of the Council and Collingwood residents. Indeed, in all conversations and from the citizen survey itself there is no question that excellence is a given.

While the Phase 1 report presented the estimated construction costs in total (although they did not include soft costs), it is important to add that the Town is not expected to foot the entire bill as it were. While this report does provide a fundraising estimate, a material part of the construction budget will be raised through foundations, private donors, and possibly social finance investors. There are some lessons that emerge from the other venues explored that would improve the potential for raising funding in this way, and they can be followed up based on the introductions made during this mandate.

The other component of any capital cost strategy is funding from senior levels of government, i.e., the Province of Ontario, and the Government of Canada. Both jurisdictions have known grant categories that would presumably benefit Collingwood, though there is lots of competition for them and the process can be quite lengthy. Then, there are the special projects related to various government priorities that arise from time to time to figure into the financing of major projects.

Finally, a word should be said about fitting into the plans of other developers with other more traditional projects serving the residential, office, tourism and other needs. If the arts centre factors into any current or future plans of that nature, there is a potential recourse to more capital funding. All in all, the Town can think of any project in terms of the net to the Town cost versus the sticker shock of the total cost.

### 5.1.2 Economic Impacts

The economic impacts of a new performing arts centre in Collingwood were analyzed to better understand the **potential future benefits of both size scenarios** at full operation.

Economic impact reports related to visitor spending were developed using the the Tourism Regional Economic Impact Model (TREIM), a free online data analysis simulation tool developed and offered by the Ministry of Tourism, Culture and Sport. TREIM is capable of simulating tourism-related economic impacts in Ontario jurisdictions (such as the economic impact of specific tourism events, impacts on the supply side by tourism industry sector, and impacts by type of capital project for the chosen region).

Figures inserted into the TREIM Visitors Spending model were taken directly from the financial modelling provided in the above section of this report. The outputs of the TREIM model can provide valuable guidance to the Town in their planning and decision-making, but it is important to note that the figures modelled previously carry a high degree of risk that should be recognized. The real economic impact of an eventual facility could vary from the analysis provided below.

For the purposes of this report, 90% of out-of-town visitors to a new performing arts facility in Collingwood are assumed to be single-day visitors; 10% are assumed to stay in town for one night, and all visitors are assumed to originate from within Ontario. Activity (for TREIM purposes, identified as “Cultural Performances”) is assumed to take place in the Census Metropolitan Area of Collingwood in 2023, and any financial data presented below is in 2023 dollars. Induced impacts are assumed to be household spending and business investment. Local government property tax revenue impacts are included.

For each of the two size scenarios, two TREIM reports were created: one to examine the economic impact of visitor spending for Community events, and another for Ticketed events. Combined, the figures in these two reports are assumed to approximate the economic impact of visitors’ spending for each of the two size scenarios.

The table below summarizes the TREIM results. Please refer to Appendix C for the full TREIM reports.

**Table 13: Summary of Economic Impacts by Facility Size**

	Scenario 1	Scenario 2
<b>Projected Annual Visitor Spending</b>	\$1.03 M	\$3.33 M
<b>Contribution to Collingwood’s Total GDP</b>	\$0.67 M	\$2.18 M
<b>Labour Income</b>	\$0.35 M	\$1.13 M
<b>Jobs Created</b>	8	26
<b>Direct Taxes</b>	\$0.26 M (4% of this is municipal)	\$0.84 M (4% of this is municipal)
<b>Total Taxes</b>	\$0.32 M (6% of this is municipal)	\$1.05 M (6% of this is municipal)

### Scenario 1: Economic Impacts

To create the TREIM reports for Scenario 1, the following inputs (consistent with the modelling previously done and outlined above) were used:

- Community Events: With 130 annual community events at a fill rate of 58%, 30,008 total tickets would be sold. **5,001 (or 17%) ticket holders will be from out of town (but within Ontario)**. For TREIM, assuming 90% of these visitors are same-day visitors, and 10% are staying in town for one night.
- Ticketed Events: With 56 annual ticketed events and a fill rate of 75%, 16,800 total tickets would be sold. **2,800 (or 33%) ticket holders will be from out of town (but within Ontario)**. For TREIM, assuming 90% of these visitors are same-day visitors, and 10% are staying in town for one night.

Annually, Community events are projected to bring \$661,704 in visitor spending to Collingwood and Ticketed events are projected to bring \$370,480; combined, **Scenario 1 is projected to bring \$1,032,184 in annual visitor spending to Collingwood.**

The above noted visitor spending is projected to contribute \$674,294 to Collingwood's total GDP: \$510,436 in direct GDP, \$65,837 in indirect GDP, and \$98,022 in induced GDP. The industries that would contribute the highest proportion to Collingwood's GDP include retail trade, arts, entertainment & recreation, food & beverage, Other Finance, Insurance, Real Estate and Renting and Leasing, Owner Occupied Housing, and indirect taxes on production.

In addition, \$350,822 is projected in labour income, 8 jobs (full-time, part-time, seasonal, and temporary employment), \$258,932 in direct taxes, and \$324,892 in total taxes. It is important to note that **most of both direct taxes and total taxes are federal and provincial, not municipal**: \$10,545 (or 4%) of direct taxes are municipal, and \$20,053 (or 6%) of total taxes are municipal.

### Scenario 2: Economic Impacts

To create the TREIM reports for Scenario 2, the following inputs (consistent with the modelling previously done and outlined above) were used:

- Community Events: with 98 annual community events and a fill rate of 29%, 22,736 total tickets would be sold. **7,579 (or 17%) ticket holders will be from out of town (but within Ontario)**. For TREIM, assuming 90% of these visitors are same-day visitors, and 10% are staying in town for one night.
- Ticketed Events: with 88 annual ticketed events and a fill rate of 75%, 52,800 total tickets would be sold. **17,600 (or 33%) ticket holders will be from out of town (but within Ontario)**. For TREIM, assuming 90% of these visitors are same-day visitors, and 10% are staying in town for one night.

Annually, Community events are projected to bring \$1,002,810 in visitor spending to Collingwood and Ticketed events are projected to bring \$2,328,731; combined, **Scenario 2 is projected to bring \$3,331,541 in annual visitor spending to Collingwood.**

The above noted visitor spending is projected to contribute \$2,176,394 to Collingwood's total GDP: \$1,647,515 in direct GDP, \$212,498 in indirect GDP, and \$316,381 in induced GDP. The industries that would contribute the highest proportion to Collingwood's GDP are the same in Scenario 2 as they are in Scenario 1. In addition, \$1,132,334 is projected in labour income, 26 jobs (full-time, part-time, seasonal, and temporary employment), \$835,744 in direct taxes, and \$1,048,641 in total taxes. **Most direct taxes and total taxes are federal and provincial, not municipal:** \$34,046 (or 4%) of direct taxes are municipal, and \$64,724 (or 6%) of total taxes are municipal.

### Other Considerations

The economic impact analyses above indicate that a larger facility is likely to have a larger local economic impact than a smaller facility; indeed, the larger facility is likely to have an economic impact approximately three times that of a small-to-medium-sized facility, at a price tag only two times that of a small-to-medium sized facility.

However, **other factors must be considered alongside the quantitative tourism-related economic impacts.** For example, what are the **Town's priorities** in terms of economic growth, and what are the **metrics** they use to measure it? What will be the impacts on the potential for **new local development**? What will be the **impacts of the net increase to the property tax base**?

### Town Priorities and Metrics

- According to stakeholder interviews with key Town employees, the Town of Collingwood does not categorize GDP as an important metric in tracking local economic growth. Instead, the Town's Economic Development department prioritizes encouraging new residents who invest locally and work from Collingwood. As well, rather than attracting new visitors, Collingwood prefers more spending by existing visitors.
- Downtown Collingwood is already quite full, and the Town is wary of adding to crowded conditions and creating more traffic in the downtown area. In addition, the Town has competing priorities regarding expanding its critical infrastructure to accommodate recent and projected population growth.

### Impacts on Potential New Local Development

- Regardless of the size of the facility, it is likely to spark new development of varying types. A new arts facility that provides rehearsal and performance space at reasonable rates to the community is likely to spark the development of new local arts programs (such as dance and/or music schools in the area). This type of development is unlikely to add many, if any jobs to the area, and this development is unlikely to occur until the facility is built, open, and running at full capacity.
- Additionally, it could make physical development in the area more feasible. Proximity to a brand-new performing arts facility could make the part of town in which it's built more desirable, and could potentially make development of new, or re-development of existing, spaces in the area more feasible.

### Returns on the Increase to the Property Tax and Other Tax Bases

- Related to the above, a new facility, regardless of the size, is likely to have a positive impact on the desirability of living in Collingwood (particularly for affluent retirees and professional remote workers, who can easily live farther away from larger city centres than other groups), leading to increases in local property tax revenues over time. South Georgian Bay Tourism has been working on building the region's brand as a tourism destination for several decades now, and a performing arts centre supports the thesis that Collingwood is a desirable place to travel, but also to reside.
- The Town has expressed their hope of attracting more residents to Collingwood from both key groups listed above because of the associated increase to the local tax base. Associated impacts from this potential influx of new residents include a higher local expense factor for food and beverage, without increasing the number of visitors to the area too much, and therefore without exacerbating issues around traffic and congestion in the downtown area (both of which are areas of concern for residents and the Town). Because these impacts are not tourism related, they aren't quantifiable using TREIM reports – but they should be taken into consideration.

## 6. Towards a Decision on Size and Scope

**There are many factors at play to come to a decision on the size and scope of programming at the eventual Collingwood Arts Centre.** This report pulls together observations drawn from the evidence provided in the sections above to help the Town to make its decision. The analysis concentrates on the likelihood of achieving success for each of the two options outlined, and the recommendations discussed below centre on an evaluation and consideration of risk.

### 6.1 Size Discussion

Using the analytical framework described in Section 2 and the analysis in other sections of this report, the table below assesses each size option.

**Table 14: Decision-Making Analysis at Different Facility Sizes**

Criteria Hierarchy	Option 1: Medium (formerly small)	Option 2: Large
<b>1. Alignment with Collingwood arts and culture sector needs (user needs)</b>	<ul style="list-style-type: none"> <li>▪ Collingwood's performing arts sector is comprised of smaller scale organizations and performance companies, who predict being able to attract audience sizes of up to 200-400.</li> <li>▪ This size option is more in line with arts centres developed in municipalities of similar size and composition to Collingwood.</li> <li>▪ Most of the arts community stakeholders consulted in Phase 2 prefer this option as</li> </ul>	<ul style="list-style-type: none"> <li>▪ Most of Collingwood's arts organizations and companies would not likely provide much business to the larger theatre envisaged for the large option.</li> <li>▪ Despite its small population size, Collingwood's location within Simcoe County, its destination status, and affluent community is viewed by some stakeholders as the perfect combination to attract high-quality entertainment and further develop Collingwood as a tourist destination.</li> </ul>



Criteria Hierarchy	Option 1: Medium (formerly small)	Option 2: Large
	<p>it most aligns with their needs and operating capacity.</p> <ul style="list-style-type: none"> <li>Should recognize that local arts groups will mainly be tenants/users of the smaller spaces, although there will be some occasions and for some festivals for which the theatre will be the new venue point.</li> </ul>	<ul style="list-style-type: none"> <li>It also responds to that segment of the arts community who consider themselves more arts and entertainment patrons or consumers, than artists themselves</li> </ul>
<b>2. Responsiveness to audience needs</b>	<ul style="list-style-type: none"> <li>The model relies on a 70/30 split between local and touring performer usages. This scale of arts centre will rely more heavily on the local community's desire to use the space.</li> <li>Will respond in good part to audience desires to see more quality performances – including many acts on the tour - and take part in more arts activities in Collingwood.</li> <li>There's a perception this will appeal more to local audience communities.</li> </ul>	<ul style="list-style-type: none"> <li>Model relies on a 50/50 split between local and touring usages. This scale of facility will have to balance the needs of both local and touring users.</li> <li>Will more completely meet audience desires to see touring performances, as well as take part in more arts activities in Collingwood.</li> <li>Because of the greater number of a larger base of touring acts, the facility should appeal more to tourist communities.</li> </ul>
<b>3. Quality and flexibility</b>	<ul style="list-style-type: none"> <li>There is a widespread desire to integrate high-quality and flexible spaces into facilities at either size range.</li> </ul>	<ul style="list-style-type: none"> <li>There is a widespread desire to integrate high-quality and flexible spaces into facilities at either size range.</li> </ul>
<b>4. Affordability in terms of access and operation</b>	<ul style="list-style-type: none"> <li>The average municipal subsidy at this size is around \$465,000.</li> <li>Performance facilities are likely to be more affordable to local users.</li> </ul>	<ul style="list-style-type: none"> <li>The average municipal subsidy at this size is around \$1.35 million.</li> <li>Performance facilities are somewhat more expensive than option 1, preventing access to some local users.</li> </ul>
<b>5. Market Size and Patronage or Usage</b>	<ul style="list-style-type: none"> <li>Sufficient local disposable income to support projected events in the near and more distant future.</li> <li>Reasonable and feasible local and tourist engagement required to meet projected fill capacities.</li> </ul>	<ul style="list-style-type: none"> <li>Insufficient local disposable income to support projected events in the near and more distant future.</li> <li>Ambitious, and therefore riskier, levels of local and tourist engagement required to meet projected fill capacities.</li> </ul>
<b>6. Capital Cost</b>	<ul style="list-style-type: none"> <li>\$25.2M to \$34.3M to build, plus soft costs and FFE.</li> <li>Projected to create \$1.03M in visitor spending per year, which is projected to create \$0.67M contribution to Collingwood's GDP, 8 jobs, \$10,545 in direct municipal taxes, and \$20,053 in total municipal taxes.</li> </ul>	<ul style="list-style-type: none"> <li>\$49.8M to \$67.5M to build, plus soft costs and FFE.</li> <li>While substantially more expensive than option medium, it could attract more investment/donor interest in a facility capable of attracting more highly touted acts</li> <li>Projected to create \$3.33M in visitor spending per year, which is projected to create \$2.18M contribution to Collingwood's GDP, 26 jobs, \$34,046 in direct municipal taxes, and \$64,724 in total municipal taxes.</li> </ul>



The question is what ambition will guide the construction, launch, development, and first 5-10 years of operations at the future Collingwood Arts Centre.

If the Town's vision is to become a **regional magnet** for touring entertainment shows not available within an hour's driving distance, the larger facility is the choice. However, experience shows that in Ontario if the arts facility is operating a performance hall with 700+ seating capacity, the municipality will likely need to be able to supply a \$1 million or more annual operating grant to it. Whatever the composition of the rest of the facility, the financial drivers will mean bringing in as many acts and people as the facility can, whereby the needs of the community get pushed to the smaller spaces. The two can co-exist, but the driver will be the operational CEO reaching for more acts and audiences with sizable wallets – with a catchment base in Collingwood that is challenging.

The other ambition is **more community focused** and would seem to better match the basic economics of Collingwood and the surrounding area. We have learned that a well-designed arts centre with a 400-500-seat main theatre will still attract a lot of touring acts in 2023, especially if organized as part of a regional tour. That would not bring as many people to Collingwood, but if this medium size is a jewel, it will still be an economic draw. Mainly, however, the operational focus would be more evenly distributed on making the arts centre more of a cultural centre for a range of artists and art-active citizens. At this scale of facility, there should be more of a focus for the CEO to work with the local community - as well as bring in touring entertainment. It would also mean that exceeding the target deficit (from Phase 1 financial projections) is less of a risk.

In sum, although a large arts centre is dearly wanted by a passionate and supportive community, it is a major investment by the community and the Town. Evidence is that **there is a sizable risk that the population of Collingwood, even fast growing as it is, will not fill a big theatre. Based on the analysis there is unlikely to be enough disposable income and enough ticket buyers from Collingwood and the region alone.**

The costs to construct arts facilities are going up. We acknowledge that the Town of Collingwood should be able to rely on public and private donors for construction, so that it doesn't need to pay for more than a third of the cost of the facility. It is not clear if a fundraising drive is more doable in the larger scenario, but it would definitely carry higher capital costs. Also, it is clear via pure correlation evidence that larger venues with larger operations need larger annual subsidies from the sponsoring municipality – the risk is just higher for an annual million-dollar deficit even though there is a chance it could be done for less.

**From the perspective of identified risk, Nordicity recommends moving forward with Option 1 – described as “small” in phase one though it’s truly more of a “medium” sized option.** The smaller facility size better aligns with most local users' needs and desires around cost and capacity. Municipalities of comparable size to Collingwood tend to develop facilities of similar size ranges, likely influenced by their local population. The capital costs for construction, and projected audience and operational scenarios are most feasible from the level of Option 1 would ultimately be best for Collingwood at this time.

## 6.2 Scope/Space Needs Summarized

No matter what scale of facility pursued, the Collingwood Arts Centre will **need to be developed in consideration of design-excellence with high quality facilities** to enable professional performances to take place in the space. If done right, the arts centre will be another jewel to help contribute to the growth of the Downtown Creative District.

Regarding space needs, Nordicity summarizes what it heard from our phase 2 discussions (see Section 3.1 for more detail on must have feature/design considerations).

- **At least 2 Performance Spaces** – one should be a more flexible black box with possible seating ranging from 150-250, and a larger space in the realm of 400-550 seats. While Collingwood does have many good qualities that might suggest it could thrive with a larger performance facility, the population demographics don't support the rationale for larger spaces.
- **1-2 Rehearsal Spaces** – with sprung flooring, mirrors, bars, sound equipment, proper lighting, ventilation. At least one purpose-built space, one more multipurpose designed.
- **1-2 Education/Exhibition Spaces** – with appropriate presentation amenities and tech infrastructure to enable different kinds of engagement. Consideration should be given to adding running sinks/water so spaces can also be used as studio space for visual artists. These spaces should be largely multi-purpose, with the needs of various arts communities in mind.
- **Lobby Space attached to a Café/Restaurant** – to encourage foot traffic, youth and young adult engagement, and community use of the facilities open spaces. Lobby space will double as visual arts exhibition space and should be designed in a way that invites people to congregate and connect.

It is also recommended that the Town explore additional spaces they already own/operate in downtown Collingwood in parallel, to see if there are any additional spaces within walking distance of a new facility that could meet some of these needs to save on square footage. Having additional satellite facilities located throughout the downtown and waterfront area will continue to strengthen its reputation as an arts district and future growth plans.

Giaimo has developed an updated estimate of space sizing in the table below.

**Table 15: Updated Space Programming Needs**

<b>Space Programming</b>		<b>43,951-48,301 sq.ft.</b>
<b>"Must Have" Spaces</b>		<b>43,951</b>
Public Gathering Areas		3,887
Front-of-House		2,200
Theatre 1 (400-500 capacity, fixed seating)		7,768
Theatre 2 (150-250 capacity, flexible seating)		3,000
Administration		1,230
Theatre Support Spaces		4,200
Studios/Classrooms		5,070
Services/Circulation		13,696
Additional office and catering		800
Retail and market space		2,200
<b>+ "Should Have" Spaces</b>		<b>46,201</b>
Outdoor component		2,250
<b>+ "Could Have" Spaces</b>		<b>48,301</b>
Additional gallery and studios		1,500
Apartment for artists		600

## 7.0 Location Assessment

**Image 1: Map showing six short-listed sites based on Phase 1 Report**



**Location is an essential part of the success of an arts centre.** It is necessary that any site selected has the capacity to not only support the size and scope recommended in section 7, but also align with the overall community vision for a new arts centre.

At the end of phase 1, six sites were short-listed as having the potential to be the site of the arts centre, based on area (sq.ft.) requirements as well as the general location recommendations for downtown and waterfront. Building off of this work to date, this section of the report includes a more detailed assessment based on criteria defined in section 2.2. The goal of this assessment is first to confirm the feasibility of each site through the consideration of more detailed required factors, and then to narrow down the six sites to a maximum of two sites for further consideration in this study (section 8).

## 7.1 Current Use and Availability of Development

Current use and availability of development is considered a required factor for moving ahead in the assessment framework; if a site is not recommended based on these criteria, it will not be further assessed in the following sections. The findings for each site is briefly summarized in the below table, and were developed to answer the following questions:

- From a use and programming perspective, is this site available for new construction or redevelopment in the next 3-7 years? Would acquisition from the Town be required? Is the owner and users of the site open to this site being used for a new arts centre?
- What is the site currently being used for, and how would these uses be impacted?
- Are there already future development plans underway for the site?
- If the construction of the arts centre involves the displacement of programming, how feasible is it to reintegrate this programming into the development, or to relocate the programming elsewhere in Collingwood?

**Table 16: Decision-making based on Current Use and Availability**

Site	Assessment	Recommendation
<b>1. Eddie Bush Arena</b>	The site is owned by the Town, thus acquisition is not required. It is currently being used as an arena. At the end of Phase 1, it was determined that availability of this site was dependent on the development of a new Multi-Use Recreation Facility. During this Phase 2, it has been determined that the timeline of a potential new MURF does not align with the desired timeline of this arts centre and the possibility of this site being available in the next 3-7 years is unknown but unlikely. Given the specialized facility requirements of this recreation centre's programming, relocation is not feasible unless a new MURF is built in the Town.	This site is not available and thus <b>not recommended for further consideration</b> within this framework. Development would require the displacement of the arena programming with no current feasible replacement or relocation plans
<b>2. Leisure Time Club</b>	The site is owned by the Town, thus acquisition is not required. It is currently being used by the Leisure Time Club, a non-profit dedicated to providing programming for Senior. Development of this site into an arts centre would require that	This site is available and thus <b>recommended for further consideration</b> within this framework. However, it is also recommended that if selected, it

Site	Assessment	Recommendation
	this programming either be integrated into the new arts centre, or be provided elsewhere in the Town. Given that this current programming does not have any specialized facility requirements, integration or relocation are both seen as feasible options, but added challenges.	will be a requirement that the Town collaborate with the Leisure Time Club to determine an appropriate relocation strategy to ensure existing programming can continue either on the site or elsewhere within the Town. This is considered a challenge for this site, but not significant enough to prevent development.
<b>3. Grain Terminal</b>	The site is owned by the Town, however Streetcar Development Inc. and Dream Unlimited Corp. were selected in 2022 by the Town to revitalize the site. Development plans are already underway for this site, and thus availability is dependent on these plans. Through discussions with Streetcar, it has been confirmed that the development team is open to potentially revising plans for this site to integrate a new arts centre. Through further discussion, it has also been confirmed that there is sufficient space within the development plans to allow for the integration of an arts centre. The details of what this partnership would entail would need to be determined, however it would likely be similar to the partnership already underway between all parties for this site.	This site is available and thus <b>recommended for further consideration</b> within this framework. However, there are development plans already underway for this site, and thus a new arts centre would need to be integrated into these development plans.
<b>4. 140 Ste Marie St (Parking Lot)</b>	This site is owned by the Town and thus acquisition is not required. It is currently used for parking, which is a useful and needed service. However, this use is not site specific and can be replaced and/or provided either on the site through redevelopment, or elsewhere in the Town. No other redevelopment plans for this site are currently known.	This site is available and thus <b>recommended for further consideration</b> . However, it will result in the displacement of parking, that will need to be replaced elsewhere in downtown Collingwood. This displacement is seen as a challenge for redevelopment, but not significant enough to prevent development of an arts centre as alternative solutions can be determined.
<b>5. 101 Pine St (Parking Lot)</b>	This site is owned by the Town and thus acquisition is not required. It is currently used for parking, which is a useful and needed service. However, this use is not site specific and can be replaced and/or provided either on the site through redevelopment, or elsewhere in the Town. No other redevelopment plans for this site are currently known.	This site is available and thus <b>recommended for further consideration</b> . However, it will result in the displacement of parking, that will need to be replaced elsewhere in downtown Collingwood. This displacement is seen as a challenge for redevelopment, but not significant enough to prevent development

Site	Assessment	Recommendation
		of an arts centre as alternative solutions can be determined.
<b>6. 48 Ste Marie St (Parking Lot)</b>	This site is owned by the Town and thus acquisition is not required. It is currently used for parking, which is a useful and needed service. However, this use is not site specific and can be replaced and/or provided either on the site through redevelopment, or elsewhere in the Town. No other redevelopment plans for this site are currently known.	This site is available and thus <b>recommended for further consideration</b> . However, it will result in the displacement of parking, that will need to be replaced elsewhere in downtown Collingwood. This displacement is seen as a challenge for redevelopment, but not significant enough to prevent development of an arts centre as alternative solutions can be determined.

## 7.2 Infrastructure and Engineering Requirements

Infrastructure and Engineering Requirements is considered a required factor for moving ahead in the assessment framework; if a site is not recommended based on these criteria, it will not be further assessed in the following sections. The findings for each site are briefly summarized in the below table, and were developed to answer the following questions:

- From a civil infrastructure and servicing perspective, is development of this site into an arts centre of the size proposed in this Study feasible?
- What infrastructure and planning studies will be required in future phases of this project to allow for redevelopment?

This assessment is high-level, made in close consultation with the Town of Collingwood's Engineering Services Department Staff and based on information gathered through infrastructure and servicing maps (which are provided after the table). As such, **specialized assessment and reports from additional sub-consultants will be required as part of the future design and construction** of the arts centre. The required studies for the final site will include, but are not limited to:

- Traffic Impact Study
- Parking Need Study
- Stormwater Management Report
- Functional Servicing Report
- Geotechnical Investigation
- Emergency Access Risk Assessment
- Plans: General Site Servicing Plan, Grading Plan, Erosion/Sediment Control Plan

Finally, it should be noted that all sites have been found to fall within the Nottawasaga Valley Conservation Authority (NVCA) area. As such, **design and construction of the arts centre on any of these sites will require consultation and approval from NVCA.**

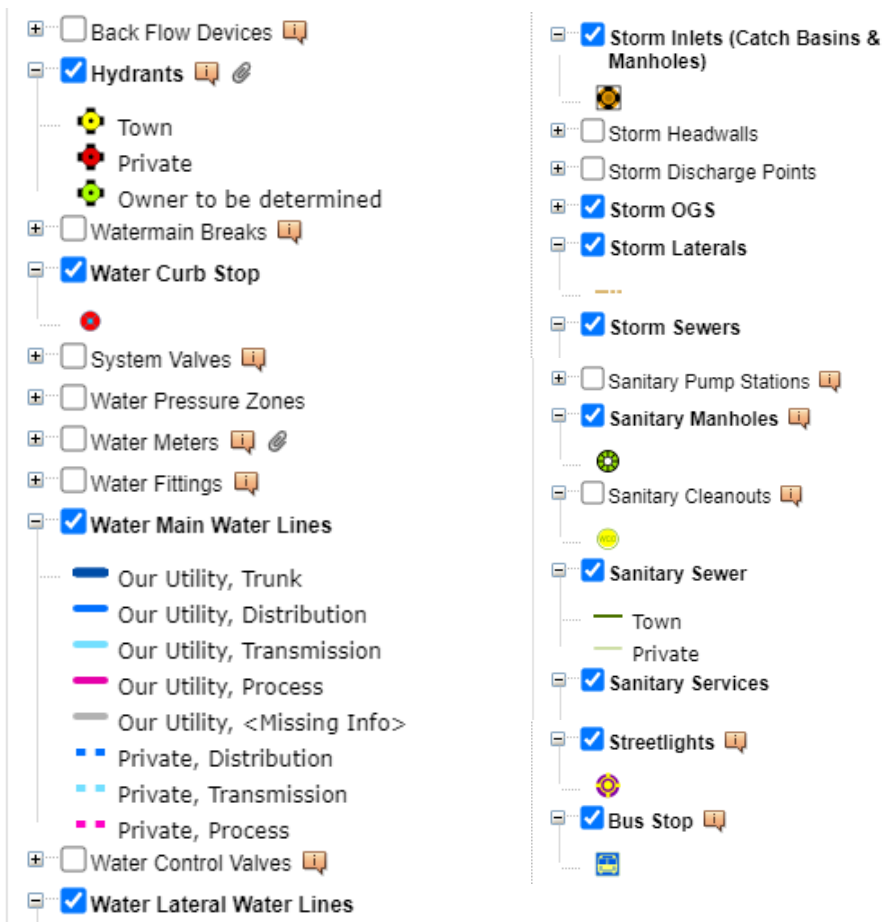
**Table 17: Decision-making based on Infrastructure and Engineering Requirements**

Site	Assessment	Recommendation
<b>1. Leisure Time Club</b>	A major transmission watermain to New Tecumseth and a major trunk storm culvert traverse through this site, both of which cannot be moved. Any construction on this site would be required to maintain a 6.0m and 4.5m offset from the location of the watermain and culvert infrastructure, respectively (see Image 2). Development of an arts centre may also require reconstruction of Minnesota Street to replace sanitary sewers and watermain, which would result in substantial additional costs not currently planned for in the Town's budget. Due to these conditions, any new construction would need to be limited to the footprint of the existing building on this site. In phase 1 the area of this site was based on property lines of the entire lot (131,500sq.ft.), but are now revised to the footprint of the existing building (11,000sq.ft.) which is insufficient for the requirements of the arts centre.	This site is unavailable and thus <b>not recommended for further consideration</b> within this framework. The negative impacts to servicing of downtown Collingwood that would result from the development of an arts centre on this site are too significant to allow, and the area (sq.ft.) allowed for development is insufficient.
<b>2. Grain Terminal</b>	The current state of this site has very limited servicing, and thus details on infrastructure via a servicing map were unavailable for assessment. However, there are large redevelopment plans already underway for this site, by both the Town and the development partners Streetcar and Dream, which will result in new infrastructure and servicing sufficient to support an arts centre in the near future.	This site is available and thus <b>recommended for further consideration</b> within this framework. However, it should be noted that the state of infrastructure and servicing for this site are largely unknown and there is potential for challenging conditions or construction delays. In particular, studies assessing the fill area of the site should be prioritized to understand any potential costs related to removal or treatment of contaminated soil.
<b>3. 140 Ste Marie St (Parking Lot)</b>	Located downtown, this site has sufficient servicing (watermain and sewers) to support an arts centre, however some minor upgrades may be needed. Various infrastructure impacts will need to be considered for the development of this site, such as the displacement of various catch basins, however these impacts are minor and solutions can easily be developed (see Image 3). Recent infrastructure investments have been made to this site, specifically through the installation of multiple electric parking stations.	This site is available and thus <b>recommended for further consideration</b> . However, since electric parking stations were recently installed at this site, development would result in the loss of this new infrastructure investment made by the Town.



Site	Assessment	Recommendation
<b>4. 101 Pine St (Parking Lot)</b>	Located downtown, this site has sufficient servicing (watermains and sewers) to support an arts centre, however some minor upgrades may be needed. Various infrastructure impacts will need to be considered for the development of this site, such as the displacement of various catch basins, however these impacts are minor and solutions can easily be developed (see Image 4). Recent infrastructure investments have been made to this site, specifically through the installation of multiple electric parking stations.	This site is available and thus <b>recommended for further consideration</b> . However, since electric parking stations were recently installed at this site, development would result in the loss of this new infrastructure investment made by the Town.
<b>5. 48 Ste Marie St (Parking Lot)</b>	Located downtown, this site has sufficient servicing (watermains and sewers) to support an arts centre, however some minor upgrades may be needed. Various infrastructure impacts will need to be considered for the development of this site, such as the displacement of various catch basins, however these impacts are minor and solutions can easily be developed (see Image 5).	This site is available and thus <b>recommended for further consideration</b> .

**Image 2: Infrastructure and Servicing Map - Legend**

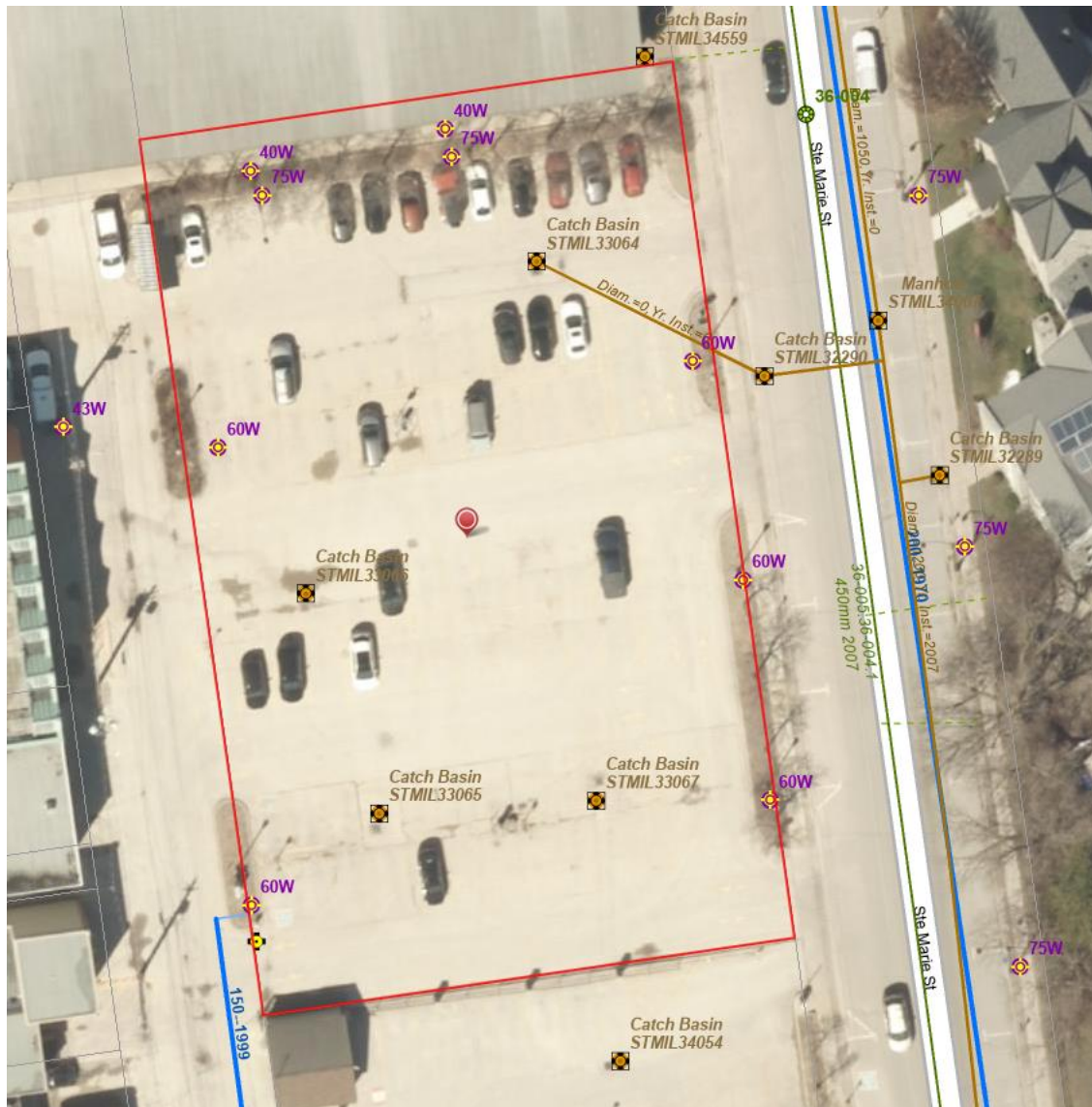


### Image 3: Infrastructure and Servicing Map – Leisure Time Club



*For legend, please reference Image 2.*

**Image 4: Infrastructure and Servicing Map – 140 Ste Marie Street**



For legend, please reference Image 2.



[illegible]

## Phase 2: Collingwood Arts Centre Feasibility – Final Report

## Phase 2: Collingwood Arts Centre Feasibility – Final Report

### 7.3 Site Access

The assessment for each site in regard to site access is briefly summarized in the below table, and was developed to answer the following questions:

- How accessible is this site via car, transit, and active transportation?
- Based on the recommended size of the arts centre outlined in this Study, what considerations need to be taken into account in terms of site access?

At this stage of the framework, four sites remain in consideration, with the goal of narrowing down selection to a maximum of two sites for further study in section 8. Given that all four sites can technically be accessed, this criteria does not assess if it's possible nor is this criteria considered a required metric as previous criteria were. Instead, it reviews the implications related to site access to provide considerations in the decision making process. This high-level assessment will also be used to form an understanding of the opportunities and challenges of the two short-listed sites in Section 8.

This assessment is high-level, and it is recommended that a Transportation Engineer be engaged in future phases of the design and construction of an arts centre to complete a more detailed Traffic and Access Analysis.

**Table 18: Decision-making based on Infrastructure and Engineering Requirements**

Site	Assessment	Recommendation
<b>1. Grain Terminal</b>	In its current state, site access to the waterfront spit is limited. However, redevelopment plans for this site are currently already underway that include an upgraded street, parking, and trails. The trail will significantly improve active transportation access, while parking will improve car access. However, car access will continue to be a challenge due to the "single-entry" artery onto the spit.	This site is <b>recommended for further consideration</b> within this framework. Due to the high capacity of an arts centre of this size, site access from all perspectives will be a challenge at this site. In particular, the single-road access to the spit will result in considerable congestion during peak use-times. However, this challenge is not considered significant enough to prevent feasibility of development as solutions can be further developed. An Emergency Access Risk Assessment should be prioritized before further design of this site.
<b>2. 140 Ste Marie St (Parking Lot)</b>	Downtown Collingwood is the most accessible location in terms of public transit and active transportation (bicycling and walking). Car access, especially during high-capacity events, will be challenging due to limited parking spots available in Downtown Collingwood. This challenge is further amplified by the fact that this site is currently providing numerous surface parking spots, that would be lost through redevelopment of this site.	This site is <b>recommended for further consideration</b> within this framework. Due to the high capacity of an arts centre of this size, site access from all perspectives will be a challenge at this site. In particular, the development of this site will result in reduced surface parking in downtown. However, this challenge is not considered significant enough to prevent feasibility of

Site	Assessment	Recommendation
		development as solutions can be further developed.
<b>3. 101 Pine St (Parking Lot)</b>	Downtown Collingwood is the most accessible location in terms of public transit and active transportation (bicycling and walking). Car access, especially during high-capacity events, will be challenging due to limited parking spots available in Downtown Collingwood. This challenge is further amplified by the fact that this site is currently providing numerous surface parking spots that would be lost through redevelopment of this site.	This site is <b>recommended for further consideration</b> within this framework. Due to the high capacity of an arts centre of this size, site access from all perspectives will be a challenge at this site. In particular, the development of this site will result in reduced surface parking in downtown. However, this challenge is not considered significant enough to prevent feasibility of development as solutions can be further developed.
<b>4. 48 Ste Marie St (Parking Lot)</b>	Downtown Collingwood is the most accessible location in terms of public transit and active transportation (bicycling and walking). Car access, especially during high-capacity events, will be challenging due to the limited parking spots available in Downtown Collingwood. This challenge is further amplified by the fact that this site is currently providing numerous surface parking spots that would be lost through redevelopment of this site.	This site is <b>recommended for further consideration</b> within this framework. Due to the high capacity of an arts centre of this size, site access from all perspectives will be a challenge at this site. In particular, the development of this site will result in reduced surface parking in downtown. However, this challenge is not considered significant enough to prevent feasibility of development as solutions can be further developed.

## 7.4 Destination and Context

The assessment for each site in regard to destination and context is briefly summarized in the table below, and was developed to answer the following questions:

- Is this site well-suited to meet the community vision of an arts centre that acts as a location landmark and destination?
- What is the surrounding urban context of this site, and does it align and support the needs of an arts centre? Similarly, does a new art centre align with and support the needs of the adjacent existing building uses?
- What is the potential “curb appeal” and prominence of this site when considering the design of an arts centre?
- Based on the recommended size of the arts centre outlined in this Study, what would the resulting massing of the building be on this specific site and does it have the potential to integrate into the context?
- How well does this site allow for the development of an arts centre that meets the Design Guidelines provided in Phase 1 of this Study?



At this stage of the framework, four sites remain in consideration, with the goal of narrowing down selection to a maximum of two sites for further study in Section 8.

**Table 19: Decision-making based on Infrastructure and Engineering Requirements**

Site	Assessment	Recommendation
<b>1. Grain Terminal</b>	The Grain Terminals are already a well-established iconic landmark within Collingwood; integrating an arts centre into this location would ensure that the facility is a landmark. The waterfront and park also provide the opportunity for the arts centre to be a unique destination in not only Collingwood, but all of Ontario. The surrounding amenities on this site are currently very limited, however development plans currently underway will result in adjacent programming that would align with and support an arts centre (see Section 8.1 for further details on the redevelopment plans)	This site is <b>recommended for further consideration</b> in this study.
<b>2. 140 Ste Marie St (Parking Lot)</b>	Downtown Collingwood is already a primary destination within Collingwood; however, the potential for the arts centre to become a landmark within this destination would highly depend on the design of the facility. The site is directly adjacent to a recreational facility (Eddie Bush Arena).	This site is <b>not recommended for further consideration</b> in this study. While the site is technically feasible, based on this assessment it is considered less-desirable in comparison to 48 Ste Marie St which shares all of the strengths and opportunities of this site. If in the future 48 Ste Marie St is no longer available, the Town can reconsider this site as an option.
<b>3. 101 Pine St (Parking Lot)</b>	Downtown Collingwood is already a primary destination within Collingwood; however, the potential for the arts centre to become a landmark within this destination would highly depend on the design of the facility. This site includes a recently built bus terminal on the most prominent corner of the site, which would require construction behind this.	This site is <b>not recommended for further consideration</b> in this study. While the site is technically feasible, based on this assessment it is considered less-desirable in comparison to 48 Ste Marie St which shares all of the strengths and opportunities of this site. If in the future 48 Ste Marie St is no longer available, the Town can reconsider this site as an option.
<b>4. 48 Ste Marie St (Parking Lot)</b>	Downtown Collingwood is already a primary destination within Collingwood; however the potential for the arts centre to become a landmark within this destination would highly depend on the design of the facility. Out of all sites assessed, this site is in the closest proximity to other key cultural and community-focused facilities in Collingwood	This site is <b>recommended for further consideration</b> in this study.



Site	Assessment	Recommendation
	such as Creative Simcoe Street, the public library, and Collingwood Museum.	

Based on this location assessment completed through the site selection evaluation framework, Giaimo recommends refining the short-listed site selection to two sites for further study: 48 Ste Marie St and the Grain Terminals. Despite four sites being considered feasible through this assessment, three of these sites are highly similar and nearly interchangeable: 101 Pine Ste, 48 Ste Marie St, and 140 Ste Marie St. As such, these three were compared to each other directly and it was determined that 48 Ste Marie St is the most suitable of the three. While 48 Ste Marie St is being recommended as one of the two final sites, it should be noted that these three are mostly interchangeable. As such, if new information becomes available that results in 48 Ste Marie St being unavailable in the future, that the other two parking lots would also be suitable and feasible for reconsideration.

## 8. Site Recommendation

**Both 48 Ste Marie St and the Grain Terminal have exciting potential to meet the desired vision, scope, and size of the arts centre.**

This section further studies these two sites to understand what a new arts centre at either location would entail. A site map offers a comparison of the two locations in regards to car, transit, and active transportation access. A massing model was then developed for both to help visualize how the programming, scope, and size outlined in section 3.2 would fit within each location. The models are not intended to be a fully-realized design for the arts centre, but rather a proof of concept for each to aid in the decision making process. The massing models are accompanied by a written description of the vision of the arts centre, as well as what the implications of this vision would be in regards to parking and costing. Following this is a diagram showing the current context of the site through a site elevation collage. Given that the current context of the Grain Terminal site is significantly different than the future context that the arts centre would be situated within, renderings and plans of the Grain Terminal redevelopment are also provided by Streetcar.

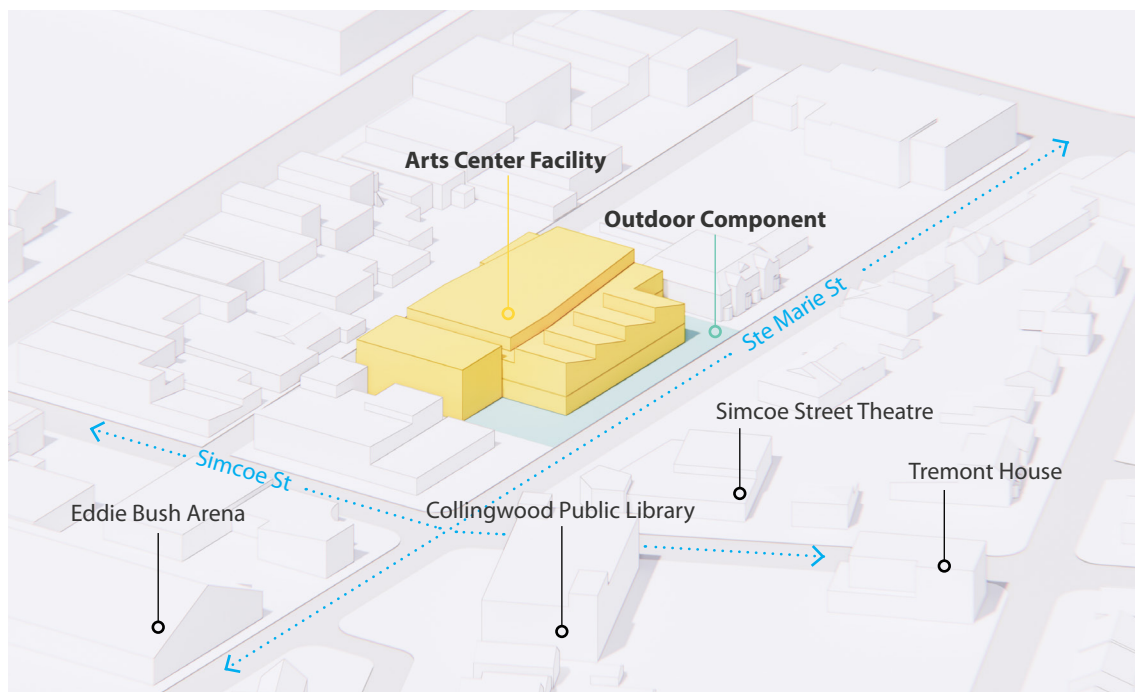
Based on this process, the findings indicate that neither option is objectively better, rather both are suitable sites that offer two different approaches. While the initial intention of this study was to recommend one final site, throughout this study **Giaimo have determined that both sites offer non-comparable approaches, and as such recommends that both be considered further in consultation with the Town, stakeholders, and public to determine which approach is preferred.** This section summarizes the findings of this process and outlines the opportunities and challenges of each for further consideration.

Image 7: Map showing site access of the two short-listed sites



## 8.1 A new arts centre in Downtown Collingwood (48 Ste Marie St)

**Image 8: Drawing showing potential massing model of a new arts centre at 48 Ste Marie St**



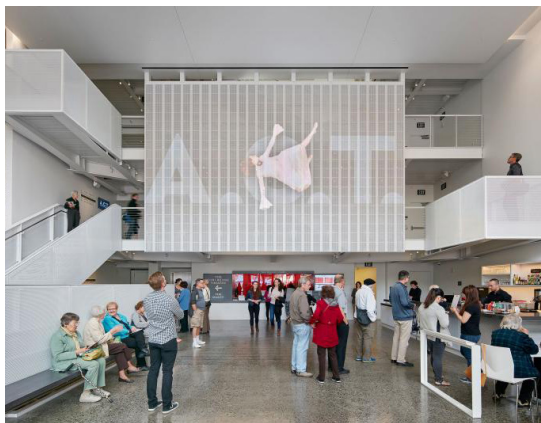
Description: **a new 45,000 sq.ft. arts centre** constructed on 35,000sq.ft. parking lot **in Downtown Collingwood**. There is potential for **small outdoor components throughout the facility**, such as a small urban plaza in front of the entrance of the building along Ste Marie St, or a rooftop garden. The proposed massing includes **a newly constructed 2-level 3-storey building**. All space programming and associated sq.ft. requirements outlined in section 3.2 are included in this facility. This stand alone facility would be adjacent to various downtown amenities including Creative Simcoe Street.

Parking: for an arts centre of this capacity, the current Town of Collingwood **by-law requires 150-200 parking spots**. Additionally, this site currently provides approximately 80-100 parking spots within Downtown Collingwood. Based on this massing model, the site cannot accommodate this number of surface parking lots. As such, to meet the by-law requirement a new parking lot would need to be built in addition to the arts centre either underground on-site or as a parking garage nearby.

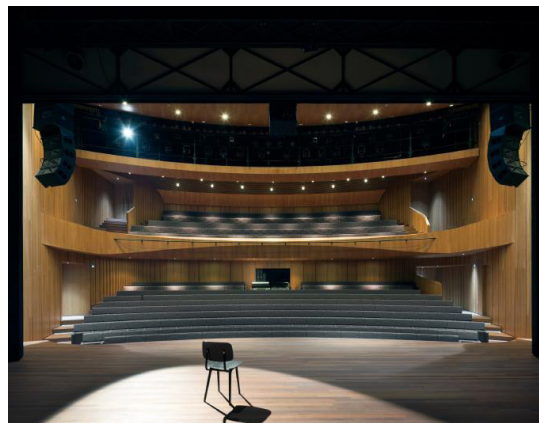
Costing: At this preliminary feasibility stage, the **estimated cost for construction of this facility is \$25M-34M**. This estimate is based off of the Altus Group's 2022 Canadian Cost Guide and aligns with the cost estimates in section 5.1.1. In addition to this construction cost of the arts centre, **the construction of a new 200 spot parking lot is estimated at costing over \$10M depending on being above or below grade**. However, it should not be immediately assumed that this cost needs to be included as part of the arts centre budget. The actual need for a new parking lot in Downtown Collingwood should be further studied such as by a Transportation Engineer and/or as part of a larger Downtown Collingwood Planning process. Given that the parking calculations are based on by-law requirements, it is possible for the Town to choose to apply alternative requirements for this site depending on what solution is most needed and feasible.



**Image 9: Precedents for a new construction arts centre within Downtown Collingwood, providing further visualization of Image 7**



*Arts centre lobby (American Conservatory Theatre by Skidmore, Owings & Merrill)*



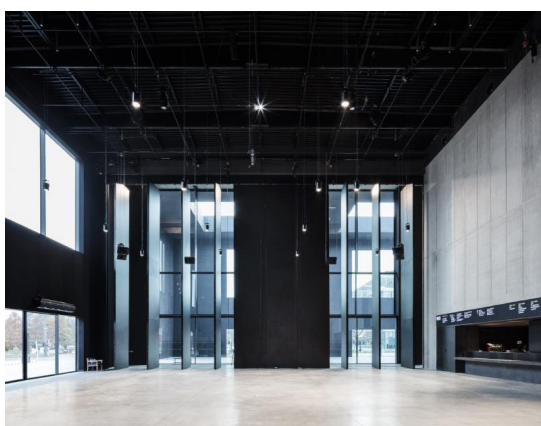
*Medium-sized theatre (Singer Laren Theatre by KRFT)*



*Central contemporary arts centre integrated (HeyTown Art Center by META-Project)*



*Outdoor urban plaza (Boston University Booth Theatre by Elkus Manfredi)*



*Flexible small secondary performance and studio space (Le Maillon Theater by LAN Architecture)*



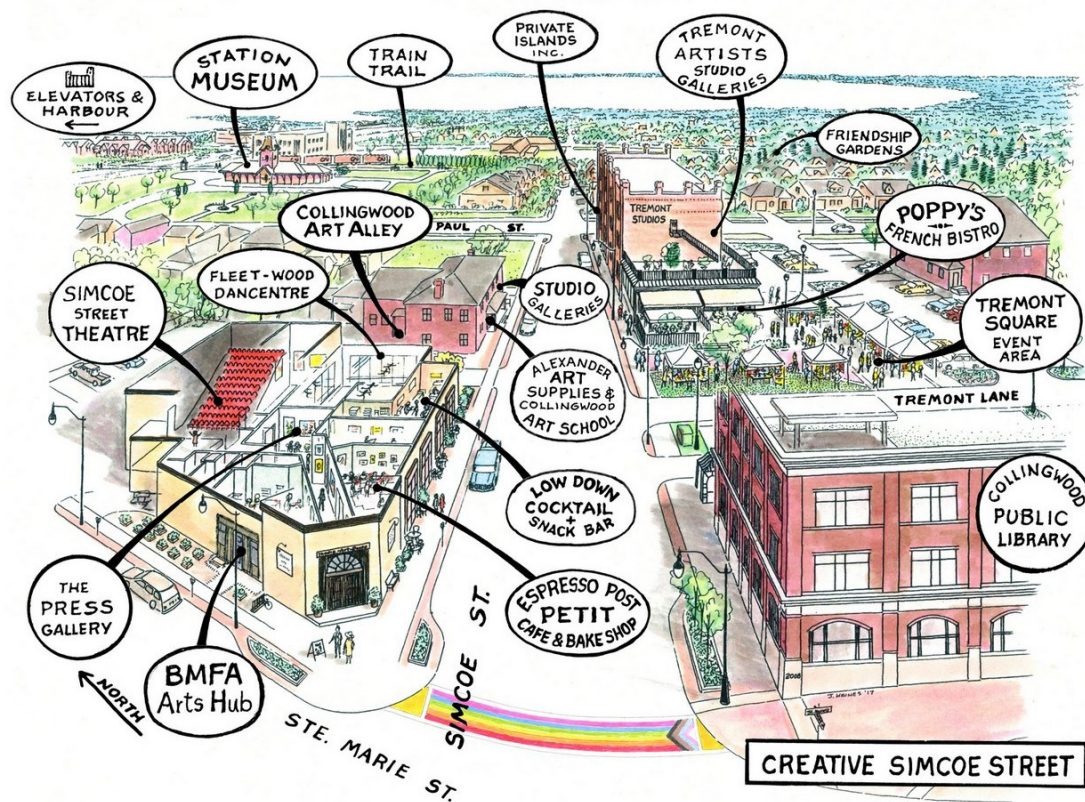
*Integrated retail and restaurant (Benugo Bar & Kitchen in Warwick Art Centre by Ellis Williams)*

Image 10: Street elevation showing current surrounding context of 48 Ste Marie St





Image 11: Creative Simcoe Street map and photo, showing the community context of 48 Ste Marie St



Map of cultural and community amenities, from Creative Simcoe Street website. <https://creativesimcoestreet.ca/>



Collingwood Summer Arts Market, photo from Blue Mountain Foundation of the Arts.

They key **opportunities and strengths** for this site are:

- The arts centre will be surrounded by many **downtown amenities** including a range of retail storefronts and restaurants. This will benefit local existing businesses in downtown, and will also give arts centre patrons a range of places to eat, drink, shop, and experience Collingwood.
- Compared to all other areas of Collingwood, downtown is **well-served by public transit and highly walkable**. This improves the overall access to facility.
- A new construction facility of this scale would contribute to the **densification of Downtown**. As a growing Town, densifying the downtown helps contribute to sustainable urban design.
- This facility would **add to the existing arts district**. Since this site is adjacent to Creative Simcoe Street, the facility would support the well-established local arts and culture community by providing them with neighboring new spaces for their programming. Additionally, the proximity to other cultural facilities means that if there is a desire to reduce the facility size (and thus reduce construction costs) there are nearby facilities that could be expanded to provide the desired programming.
- Though the site is not located directly on the waterfront, it is considered **close proximity to the waterfront** and will help support future redevelopment plans of the spit and the overall goals of the Collingwood Waterfront Master Plan.
- This assessment of 48 Ste Marie St is generally **interchangeable with two other similar parking lot sites in Downtown Collingwood**: 101 Pine St and 140 Ste Marie St. Since these three parking lots share many similarities and the assessment of each had overlapping findings, this option offers added flexibility in the planning process.

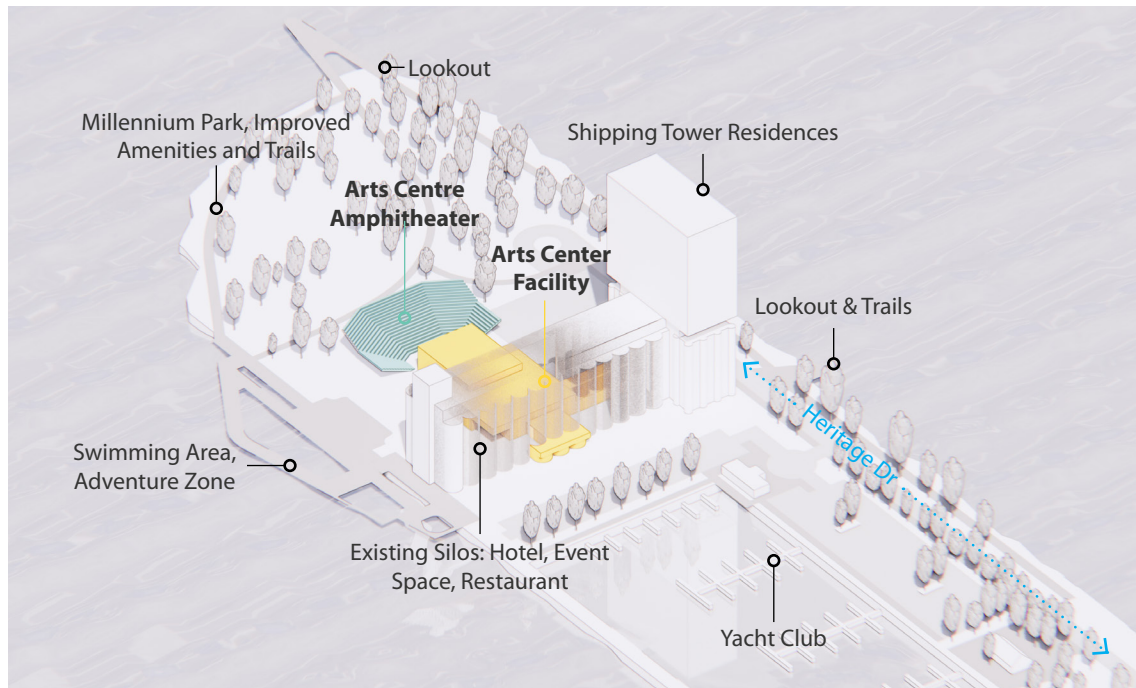
The key **challenges and weaknesses** of this site are:

- Due to the current use and limited footprint of the site, a new arts centre would result in a **reduced number of surface parking spots in downtown Collingwood**. Solutions will need to be explored, including potential for new underground parking on-site or a parking garage potentially located at one of the other downtown surface parking lots.
- This option may involve **additional costs beyond construction estimates**. If underground parking or a new parking garage needs to be built, the potential costs of this are estimated at over \$10M. Additionally, the existing 100mm watermain at this site may need to be replaced with a 150mm watermain, resulting in additional costs, pressure on funding, and more construction requirements.
- The arts centre would have impacts on all aspects of Downtown planning. A Downtown Visioning and Master Plan is being considered by the Town, which has **potential for delays** as completion of this study may be required prior to Town commitment to any large new downtown development.
- Developing this parking lot would result in **an expended Town asset that could be used for other benefits**. Currently, the parking lot is a paid lot, thus revenue generating. It is also a real estate asset with unknown land value. A "highest and best use" analysis has not been undertaken for this site, and thus using it for an arts centre meets the desired outcomes of this study but does not consider other goals and objectives for Collingwood.



## 8.2 A new arts centre at the Grain Terminal and Millennium Park

**Image 12: Rendering showing potential massing model of a new arts centre integrated into the Grain Terminals future Redevelopment**



Description: a **new 45,000 sq.ft. arts centre integrated with the Grain Terminal Development on the waterfront** (yellow space in the above image) with a **new large outdoor amphitheater expanding into Millennium Park** (green space in the above image). The proposed building massing includes **2-levels located within the existing silos building and a 2-level 3-storey new construction addition on the north side of the silos**. The entrance to the facility would be located on the south side of the silos. While the proposed sq.ft. aligns with the recommended size found in section 3.2, some programming may be shared with amenities within the Grain Terminal Development, including retail/cafe/restaurant space and event space planned as part of the larger redevelopment plans by Streetcar and Dream. As such, all programming and associated sq.ft. requirements outlined in section 3.2 have the potential to be accommodated through this site; the exact approach will need to be coordinated between the Town of Collingwood and Streetcar and Dream.

Parking: for an arts centre of this capacity, the current Town of Collingwood **by-law requires 150-200 parking spots**. The a large redevelopment plan for this site by Streetcar and Dream is currently underway and it is anticipated that these plans will include sufficient surface and underground parking to meet these needs.

Costing: At this preliminary feasibility stage, the estimated cost for construction of this facility is **\$25M-34M**. This estimate is based off of the Altus Group's 2022 Canadian Cost Guide and aligns with the cost estimates in section 5.1.1. It should be noted that given the larger redevelopment plans by the Town of Collingwood, Streetcar, and Dream are already underway for this site, it is possible that there will be capital and infrastructure cost savings as a result. Given that the facility is in the feasibility stage and not yet designed, future cost estimates will provide different and more accurate estimates.



**Image 13: Precedents for an arts centre integrated into the Grain Terminals waterfront redevelopment, providing further visualization of Image 11**



*Adaptive reuse of grain terminals (The Silo by Cobe)*



*Small multi-purpose studios (Allende Performance Hall by Dominique Coulon)*



*Performance venue on the waterfront (Isabel Bader Theatre by Snøhetta)*



*Large outdoor amphitheater (Banff Centre for Arts by KPMB)*



*Contemporary medium-sized theatre (CorpArtes Theater and Cultural Center by Renzo Zecchetto)*



*Flexible black box theatre (Crow's Theatre by DTAH and Streetcar Developments)*

Image 14: Street elevation showing current surrounding context of the Grain Terminals



Looking South West



Looking North East

Across from Proposed Site



**Image 15: Site Plan provided by Streetcar showing the future Grain Terminal redevelopment master plan**



**1. Millennium Park** – Improved with walking trails, sculpted terrain, and a flexible open lawn area for performances and recreational activity.

**2. Terminals** – Hotel use with retail, event space, restaurants, and a public corridor.

**3. Marine Tower** – Anchor for new Adventure Zone which accommodates a wide range of recreational activities with rental shops: swimming, canoeing, paddle boarding, rock- climbing, a roof walk, zip-line launch and rappelling.

**4. Shipping Tower** – New residential condominium addition.

**5. Swimming Area** – Large outdoor freshwater pool that is open to the public.

**6. Public Park** – Improved parks with areas for picnics and community BBQs.

**7. Public Parking** – 410 public parking spaces across two surface parking areas and an underground parking area.

**8. Yacht Club** – Improved with 141 surface parking stalls and a drydock storage area.

**9. Watts Boathouse** – Water services will extend to the historic Watts building.

**10. Public Marina** – The Town Marina will be improved with additional slips and servicing to the docks.

**11. Marina Services Building** – Will offer much-needed amenities and services for the town and the public with washrooms with shower facilities, storage and office space, indoor training space, and a marina store.

**12. Multi-Use Trail** – To accommodate multiple recreation and transportation modes, such as walking, bicycling, and rollerblading.

**13. Promenade / Walking Path** – Continuous walking path from the mainland towards Millennium Park, parts will be a harbour promenade along the waters' edge.

**14. Heritage Drive** – Heritage Drive will be repaved, expanded, and relocated slightly to allow for more efficient use of lands.

**15. Boat Ramp** – The existing boat ramp will be relocated and rebuilt slightly towards the west.

**16. Lookout** – Various piers along the Spit to allow for fishing and also as a place to rest and enjoy the views of the bay.

**17. Hotel / Public Boat Slips** – Additional boat slips to accommodate day visitors.

**18. Bayfront Boardwalk** – Floating dock to allow an additional walking path along the eastern bayfront.

**19. Gas Pump** – A gas dock and pump out.

Image 16: Renderings provided by Streetcar showing future Grain Terminal redevelopment



The Grain Terminal redevelopment plans including new Swimming / Adventure Zone



The Grain Terminal redevelopment plans of Rooftop Lounge and Bar



The Grain Terminal redevelopment plans of new Public Realm



They key **opportunities and strengths** for this site are:

- Integrating a new arts centre into the Grain Terminal redevelopment plans would provide **public programming within a local and regional landmark**. Plans to redevelop the Grain Terminal building and the larger waterfront spit site are currently underway by Streetcar and Dream, and include a boutique hotel with restaurant, a new condo, and improved trails, park, and public realm. An arts centre would add a public-facing and community-focused layer to these redevelopment plans.
- The facility would be an **iconic waterfront cultural destination**. The Grain Terminal, Millennium Park, and Georgian Bay landscape offer an incredibly unique setting that would benefit the new arts centre.
- The adjacent Millennium Park allows for a **large outdoor component**. The arts centre could include a new amphitheater for outdoor programming and performances. This would extend the programming capacity of this facility as well as the park.
- Given that the redevelopment of this site is already planned for, there are **potential capital expenditure savings** that may occur from integrating into these plans. This may include things like site and building infrastructure and servicing, but would need to be determined in future planning phases of this project.
- **The redevelopment plans offer ample parking**. It is anticipated that there will be underground parking and surface parking throughout the spit that will ensure the arts centre is accessible by car. In addition to this, there are also trail improvement plans.
- An arts centre would **align with the Collingwood Waterfront Master Plan (2016)** which ranks “arts and culture (e.g. theatre, music, events, festivals, etc)” as number five out of ten on the key priorities list for the waterfront.

The key **challenges and weaknesses** of this site are:

- Integrating a new arts centre into the Grain Terminal redevelopment plans would mean the facility is **subsidiary to the larger redevelopment**. The arts centre would not be a stand alone new facility, some amenities may be shared, and as such the perception and vision of the facility will be influenced by the larger redevelopment.
- This location is **disconnected from the Downtown fabric and car dependent**. Upgrades to trail will make the site more walkable and bikeable, but in poor weather conditions it is assumed that driving would be a preferred mode of transportation. Solutions can be explored, such as a shuttle.
- Given that plans for site’s redevelopment are already underway, updating these to now include an arts centre will **require additional coordination and potential for additional costs**. This includes ensuring that municipal servicing capacities, site access safety, treatment of contaminated soil, and other considerations already underway for this redevelopment are revised. A collaboration offers new opportunities, but will also involve more consultation, meetings, and overall coordination between the Town and redevelopment developer and design team.
- Working in tandem with the larger redevelopment puts **tighter timeline constraints on the planning process**. Since there is already a timeline set for the redevelopment,

there is an opportunity for the redevelopment to push the arts centre planning process ahead faster, but this also means the Town will have a limited shorter time period for decision making and to secure funding which may put the project at risk.

## Appendix A. Comparative Facility Analysis

Community demographic data was pulled from Statistics Canada's 2021 Census, facility information was gathered from the facility's website and through interviews with the facility's leadership.

**Table 3: Large size arts centres across Ontario**

	FirstOntario Performing Arts Centre	Burlington Performing Arts Centre	St. Lawrence Centre for the Performing Arts	The Rose Brampton	Living Arts Centre
<b>Community Demographics</b>					
<b>Municipality</b>	St. Catharines	Burlington	Toronto	Brampton	Mississauga
<b>Region</b>	Niagara	Halton	-	Peel	Peel
<b>Municipal Population</b>	136,803 (2021)	186,948 (2021)	2.79 million (2021)	656,480 (2021)	717,961 (2021)
<b>Regional Population</b>	477,941 (2021)	596,637 (2021)	-	1.4 million (2021)	1.45 million (2021)
<b>Median Total Income (Individual)</b>	\$37,600	\$49,600	\$39,200	\$36,000	\$39,200
<b>Median Age (Municipality)</b>	44.8	44.4	39.6	36.0	40.8
<b>Facility Information</b>					
<b># of Facilities</b>	<ul style="list-style-type: none"> <li>9 spaces available for rent.</li> <li>5 performance and presentation spaces.</li> </ul>	<ul style="list-style-type: none"> <li>4 spaces available to rent.</li> <li>2 performance spaces.</li> </ul>	<ul style="list-style-type: none"> <li>3 spaces available.</li> <li>2 performance spaces.</li> </ul>	<ul style="list-style-type: none"> <li>4 spaces available.</li> <li>2 performance spaces.</li> </ul>	<ul style="list-style-type: none"> <li>&gt;5 spaces available to rent.</li> <li>3 performance spaces.</li> </ul>
<b>Types of Facilities</b>	<b><u>Partridge Hall (770 seats)</u></b> A multipurpose concert hall. Used for live performances and community or corporate events.	<b><u>Main Theatre (718 seats)</u></b> multipurpose performance venue. <b><u>Community Studio Theatre (225 seats)</u></b> A flexible "black box" space with 2500 sq ft.	<b><u>Bluma Appel Theatre (868 seats)</u></b> proscenium stage, unique lighting, and box seats.	<b><u>The Rose Main Stage (868 seats)</u></b> horseshoe shaped main theatre. <b><u>Studio Two (120 seats)</u></b> multipurpose hall. Includes a kitchen.	<b><u>Hammerson Hall (1300 seats)</u></b> performance venue. <b><u>RBC Theatre (400 seats)</u></b> Flexible seating arrangements and smaller performances.

	FirstOntario Performing Arts Centre	Burlington Performing Arts Centre	St. Lawrence Centre for the Performing Arts	The Rose Brampton	Living Arts Centre
	<p><b><u>Robertson Theatre (200 seats)</u></b> A flexible “black box” space with 2600 sq ft.</p> <p><b><u>Recital Hall (304 seats)</u></b> A smaller multipurpose concert hall</p> <p><b><u>The Film House (199 seats)</u></b> For film screenings. Offers concessions and a bar.</p> <p><b><u>The Mann Raceway Plaza</u></b> Multipurpose outdoor venue.</p> <p><b><u>Lobby Spaces</u></b> 3 multipurpose lobby spaces.</p> <p><b><u>RBC Innovation Studio</u></b> 1500 sq ft. multipurpose studio space.</p>	<p><b><u>The Family Lobby</u></b> 5000 sq ft. for receptions, exhibitions, corporate functions, and civic events.</p> <p><b><u>The Marshalling Room</u></b> 100 people room capacity for smaller scale events.</p>	<p><b><u>Jane Mallet Theatre (499 seats)</u></b> semi-circle thrust stage.</p> <p><b><u>Rehearsal Hall</u></b> Backstage multipurpose space.</p>	<p><b><u>The Rose Lobby</u></b> multipurpose, two-level atrium (includes main theatre rental)</p> <p><b><u>The Rose Sponsor Lounge I</u></b> Private room attached to one of the audience boxes in the Rose Main Stage.</p>	<p><b><u>Rogers Theatre (110 seats)</u></b> lecture style screening space.</p> <p><b><u>Meeting Rooms/Rehearsal Space</u></b> Unclear how many/in what configurations.</p>
<b>Size of Facility</b>	95,000 sq ft.	62,000 sq ft.	100,000 sq ft.	64,000 sq ft.	225,000 sq ft.
<b>Audiences</b>	40% Local 50% Region 10% Other	80% Local 20% Other			
<b>Facility Ownership</b>	City-owned	City-owned	City-owned	City-owned	City-owned



	FirstOntario Performing Arts Centre	Burlington Performing Arts Centre	St. Lawrence Centre for the Performing Arts	The Rose Brampton	Living Arts Centre
<b>Construction Costs</b>	60 million	36.2 million	\$2.6 million	\$55 million	
<b>Year of Opening</b>	2015	2011	1970	2006	1997
<b>Revenues</b>	\$3.2 million (2021)	\$2.3 million (2021)		\$3.1 million (2015)	\$8 million (2018)
<b>Expenses</b>	\$3 million	\$1.8 million			\$8.2 million

**Table 4: Small size arts centres across Ontario**

	Charles W. Stockey Centre for the Performing Arts	Hamilton Family Theatre	Young Centre for the Performing Arts	Five Points Theatre	Orillia Opera House
<b>Community Demographics</b>					
<b>Municipality</b>	Parry Sound	Cambridge	Toronto	Barrie	Orillia
<b>Region</b>	-	Waterloo	-	Simcoe	Simcoe
<b>Municipal Population</b>	6879 (2021)	138,479 (2021)	2.79 million (2021)	147,829 (2021)	33,411 (2021)
<b>Regional Population</b>	-	587,165 (2021)	-	533,169 (2021)	533,169 (2021)
<b>Median Income (Individual)</b>	\$37,200	\$42,000	\$39,200	\$41,200	\$37,200

	Charles W. Stockey Centre for the Performing Arts	Hamilton Family Theatre	Young Centre for the Performing Arts	Five Points Theatre	Orillia Opera House
<b>Median Age (Municipality)</b>	53.2	39.2	39.6	39.2	46.8
<b>Facility Information</b>					
<b># of Facilities</b>	<ul style="list-style-type: none"> <li>5 spaces available</li> <li>3 performance spaces.</li> </ul>	<ul style="list-style-type: none"> <li>2 spaces available</li> <li>1 performance space.</li> </ul>	<ul style="list-style-type: none"> <li>~5-7 spaces available.</li> <li>3 theatre spaces.</li> </ul>	<ul style="list-style-type: none"> <li>2 spaces available.</li> <li>1 performance space.</li> </ul>	<ul style="list-style-type: none"> <li>4 spaces available.</li> <li>2 performance spaces.</li> </ul>
<b>Types of Facilities</b>	<p><b><u>Performance Hall (415 seats)</u></b> Theatre with flexible seating that can be taken down to accommodate smaller audience sizes (180).</p> <p><b><u>Festival Room (50 seats)</u></b> Multipurpose room.</p> <p><b><u>Prelude Room (50 seats)</u></b> Multipurpose room.</p> <p><b><u>ICI Lobby (200 seats)</u></b> Multipurpose lobby space.</p> <p><b><u>Bayside Patio/Deck</u></b> Multipurpose outdoor space.</p> <p><b><u>Kitchen</u></b> can be used for any events.</p>	<p><b><u>Theatre (500 seats)</u></b> Purpose built theatre</p>	<p><b><u>Baillie Theatre (~300)</u></b> performance space.</p> <p><b><u>Michael Young Theatre (230 seats)</u></b> performance space.</p> <p><b><u>Tank House Theatre</u></b> Black box flexible theatre space.</p> <p><b><u>Cabaret Space</u></b> multipurpose quiet space that can accommodate some seating.</p> <p><b><u>5 Multipurpose Spaces</u></b> of varying size/composition and usage.</p> <p><b><u>Lobby Space</u></b> includes kitchen and bar facilities.</p>	<p><b><u>Theatre (120-200 seats)</u></b> Flexible seating. Not the best quality.</p>	<p><b><u>Main Stage (677 seats)</u></b> auditorium/performance venue.</p> <p><b><u>Studio Theatre (100 seats)</u></b> black box theatre space.</p> <p><b><u>Lobby</u></b> multipurpose lobby space.</p> <p><b><u>Market Café</u></b> kitchen/catering facility.</p>
<b>Size of Facility</b>	27,000 sq ft.	59,000 sq ft.	44,000 sq. ft	10,000 sq ft.	

	Charles W. Stockey Centre for the Performing Arts	Hamilton Family Theatre	Young Centre for the Performing Arts	Five Points Theatre	Orillia Opera House
<b>Audiences</b>	Largely a regional audience with people coming in from within 100km. 55+ age group.		Anchor tenants (Soulpepper and George Brown)		Largely a regional audience with people coming in from within 100km. 55+ audience age.
<b>Facility Ownership</b>	Town-owned			City-owned	City-owned
<b>Facility Governance</b>	Town operated (like a non-profit)	Not-for-profit	Not-for-profit	City operated	City operated (like a non-profit)
<b>Construction Costs</b>	\$12 million	\$14 million	\$14 million		
<b>Construction Year</b>		2013	2006		
<b>Year of Opening</b>	2003	2013		2011	1917 (reconstruction)
<b>Statement of Operations</b>					
<b>Revenues</b>			\$2.5 million (2021)		
<b>Municipal Operating Subsidy/Grant</b>			0	\$594,370	\$500,000
<b>Expenses</b>			\$2.3 million		
<b>Excess of Revenues over Expenses</b>	(\$300,000)		\$200,000.00		

## Appendix B. TREIM Reports

**Table 5: Economic Impacts of Scenario 1 (Community Events) in Collingwood in 2023**

	<b>Collingwood (567)</b>	<b>Rest of Province</b>
<b>Total Visitors' Spending</b>	\$661,704	
<b>Gross Domestic Product (GDP)</b>		
Direct	\$327,226	\$0
Indirect	\$42,206	\$49,463
Induced	\$62,839	\$58,035
Total	\$432,271	\$107,498
<b>Labour Income</b>		
Direct	\$160,397	\$0
Indirect	\$27,832	\$30,611
Induced	\$36,672	\$38,455
Total	\$224,902	\$69,065
<b>Employment (Jobs)</b>		
Direct	4	0
Indirect	0	0
Induced	0	0
Total	5	1
<b>Direct Taxes</b>		
Federal	\$53,853	\$0
Provincial	\$105,380	\$0
Municipal	\$6,760	\$0
Total	\$165,994	\$0
<b>Total Taxes</b>		
Federal	\$74,943	\$14,894
Provincial	\$120,481	\$10,283
Municipal	\$12,855	\$4,178
Total	\$208,279	\$29,356

**Table 6 Economic Impacts of Scenario 1 (Ticketed Events) in Collingwood in 2023**

	<b>Collingwood (567)</b>	<b>Rest of Province</b>
<b>Total Visitors' Spending</b>	\$370,480	
<b>Gross Domestic Product (GDP)</b>		
Direct	\$183,210	\$0
Indirect	\$23,631	\$27,694
Induced	\$35,183	\$32,493
Total	\$242,023	\$60,187
<b>Labour Income</b>		
Direct	\$89,804	\$0
Indirect	\$15,583	\$17,138
Induced	\$20,532	\$21,530
Total	\$125,920	\$38,669
<b>Employment (Jobs)</b>		
Direct	2	0
Indirect	0	0
Induced	0	0
Total	3	0
<b>Direct Taxes</b>		
Federal	\$30,152	\$0
Provincial	\$59,001	\$0
Municipal	\$3,785	\$0
Total	\$92,938	\$0
<b>Total Taxes</b>		
Federal	\$41,960	\$8,339
Provincial	\$67,456	\$5,758
Municipal	\$7,198	\$2,339
Total	\$116,613	\$16,436

**Table 7 Economic Impacts of Scenario 2 (Community Events) in Collingwood in 2023**

	<b>Collingwood (567)</b>	<b>Rest of Province</b>
<b>Total Visitors' Spending</b>	\$1,002,810	
<b>Gross Domestic Product (GDP)</b>		
Direct	\$495,910	\$0
Indirect	\$63,963	\$74,961
Induced	\$95,232	\$87,951
Total	\$655,105	\$162,913
<b>Labour Income</b>		
Direct	\$243,081	\$0
Indirect	\$42,180	\$46,390
Induced	\$55,577	\$58,278
Total	\$340,838	\$104,668
<b>Employment (Jobs)</b>		
Direct	6	0
Indirect	1	1
Induced	1	1
Total	8	1
<b>Direct Taxes</b>		
Federal	\$81,615	\$0
Provincial	\$159,703	\$0
Municipal	\$10,245	\$0
Total	\$251,563	\$0
<b>Total Taxes</b>		
Federal	\$113,575	\$22,572
Provincial	\$182,588	\$15,584
Municipal	\$19,482	\$6,332
Total	\$315,646	\$44,489

**Table 8 Economic Impacts of Scenario 2 (Ticketed Events) in Collingwood in 2023**

	<b>Collingwood (567)</b>	<b>Rest of Province</b>
<b>Total Visitors' Spending</b>	\$2,328,731	
<b>Gross Domestic Product (GDP)</b>		
Direct	\$1,151,605	\$0
Indirect	\$148,535	\$174,076
Induced	\$221,149	\$204,241
<b>Total</b>	<b>\$1,521,289</b>	<b>\$378,317</b>
<b>Labour Income</b>		
Direct	\$564,485	\$0
Indirect	\$97,950	\$107,728
Induced	\$129,060	\$135,334
<b>Total</b>	<b>\$791,496</b>	<b>\$243,061</b>
<b>Employment (Jobs)</b>		
Direct	15	0
Indirect	1	1
Induced	1	2
<b>Total</b>	<b>18</b>	<b>3</b>
<b>Direct Taxes</b>		
Federal	\$189,526	\$0
Provincial	\$370,864	\$0
Municipal	\$23,791	\$0
<b>Total</b>	<b>\$584,181</b>	<b>\$0</b>
<b>Total Taxes</b>		
Federal	\$263,746	\$52,418
Provincial	\$424,007	\$36,190
Municipal	\$45,242	\$14,704
<b>Total</b>	<b>\$732,995</b>	<b>\$103,312</b>