



TOWN OF COBOURG

CULTURAL
MASTER
PLAN
BACKGROUND
REPORT

January 2019



About This Report

The intent of the Background Report is to distill from the research and analysis activities, key findings that can be used as discussion throughout the community consultation process. The report does not contain detail related to the assessment of internal policy and programs but provides insights related to the state of the cultural sector in Cobourg and linkages to key Town plans and priorities.

The following Background Report is divided into four sections of analysis. Each section is intended to be treated as an appendix to the Cultural Master Plan.

Sections of the Report

Section One Cultural Mapping Results	3
Section Two Plans and Policy Review	17
Section Three Cultural Labour Force	30
Section Four Emerging Trends in Arts and Culture Development Delivery in Municipalities ..	48

© 2018 MDB Insight Inc. MDB Insight Inc. has prepared this report exclusively for the Town of Cobourg.



Section One

Cultural Mapping Results





Section One

Cultural Mapping Results

The Town of Cobourg joins leading municipalities in undertaking a Cultural Master Plan to leverage cultural resources to support community development and enhance quality of life in the community.

An initial step in the undertaking of a Cultural Master Plan is the collection of cultural resources, often known as a Cultural Mapping Exercise. Cultural mapping is a systematic approach to identifying, recording, classifying and analyzing a community's cultural resources in support of economic and community development agendas.

Typically, cultural mapping supports three categories of uses:

1. Cultural mapping establishes a solid baseline of data on cultural resources that describe current conditions of the cultural sector and provide a benchmark against which to assess future growth and change. It also identifies important assets to grow the local economy and enhance quality of life.
2. Cultural mapping provides a basis of information with which land use planners and economic developers can use to inform zoning decisions, planning for heritage conservation, downtown revitalization, supporting the growth of creative industries, and inform economic development strategies.
3. Cultural mapping supports increased awareness of these assets for both residents and tourists. It also supports opportunities to improve collaboration across different types of local cultural group and activities.

Cultural Mapping Process

There is a myth that communities lack information on cultural resources. The reality is that a great deal of information does exist but is unfortunately collected in different ways by different agencies or sources. The first step in cultural mapping is determining a consistent set of categories of cultural resources – known as a Cultural Resource Framework (CRF) - within which a wide range of existing information can be effectively consolidated.

The CRF used for the Town of Cobourg was developed by MDB Insight and has been endorsed by the Province of Ontario as a guide for municipalities undertaking cultural mapping exercises.

The framework is not intended as a rigid set of categories applicable in all communities. Each municipality must interpret it and adapt it to their particular circumstances and needs. The sub-categories or disciplines surrounding each major category are not definitive but rather are meant to illustrate the types and range of resources in that category. A major source of the definition of cultural resources in the CRF is Statistics Canada's Canadian Framework for Cultural Statistics.

The steering committee for the Cultural Master Plan endorsed the following CRF as an overall guide for the mapping process.



Cultural Resource Framework



Source: MDB Insight

The second step is collecting the initial data. The initial source of cultural mapping data was drawn from D&B Hoovers. D&B Hoovers consolidates information from Statistics Canada and local Yellow Pages. In more urban communities, infoCanada can provide upwards of 75-80% of cultural resource inventories/databases. However, in communities under 30,000 people, such as Cobourg, it tends to generate less data. The result is that the process must rely to a much greater degree on local knowledge and community input.

Beyond the data generated by D&B Hoovers, the following sources contributed valuable information to building the cultural asset inventory.

- Town of Cobourg organization directories, program guides, tourism guides and calendar of events
- Northumberland Arts Council Archive
- Ontario Plaques Website
- Cultural Master Plan Steering Committee
- Advanced web-based searches
- Chamber of Commerce Business Directories

The third step is a review to identify any duplicate records, ensure assets were correctly classified and fill in any missing information. The review also requires local knowledge to comment and ensure assets have been correctly identified. In this instance the Cultural Master Plan's Steering Committee provided a local knowledge review of the cultural resources.

Once the data collection is complete, the data can be analyzed spatially through the use of Google



fusion tables. Spatially mapping cultural assets can identify areas where arts and cultural resources are concentrated and areas where they are sparse. Mapping cultural assets along with other community assets such as employment centers and transportation nodes and corridors can also provide insight into advantageous smart growth locations where arts and culture investments can be strengthened and/or concentrated.

Data Limitations

It is important to note that formal government statistics (only one source of data informing cultural mapping) do not capture the full range of cultural industries and occupations. For example, there are many individuals involved in cultural work, either on a volunteer or part-time basis who “fly below the statistical radar”. Examples include:

- Cultural activities carried out by organizations (such as performing arts groups) that do not have full-time employees, but operate with volunteers, part-time staff, or casual/seasonal employees
 - The full complement of human resources would not be captured in this case, whereas the number of employees would be captured by other more traditional economic activities
 - If the organization or activity is not formally registered as a business for tax purposes
- Cultural activities that are carried out part time or casually by individuals who work full-time in an occupation unrelated to culture. Even though it may be a secondary source of income, it is not being reported as the main source of income and therefore “not captured” statistically either from the income perspective or from the occupation perspective
- Cultural activities that could operate as a business but are not regarded as such by the “owner” and therefore not registered with a business number
- Self-employment in the cultural sector may not be captured as such on census or other reporting forms

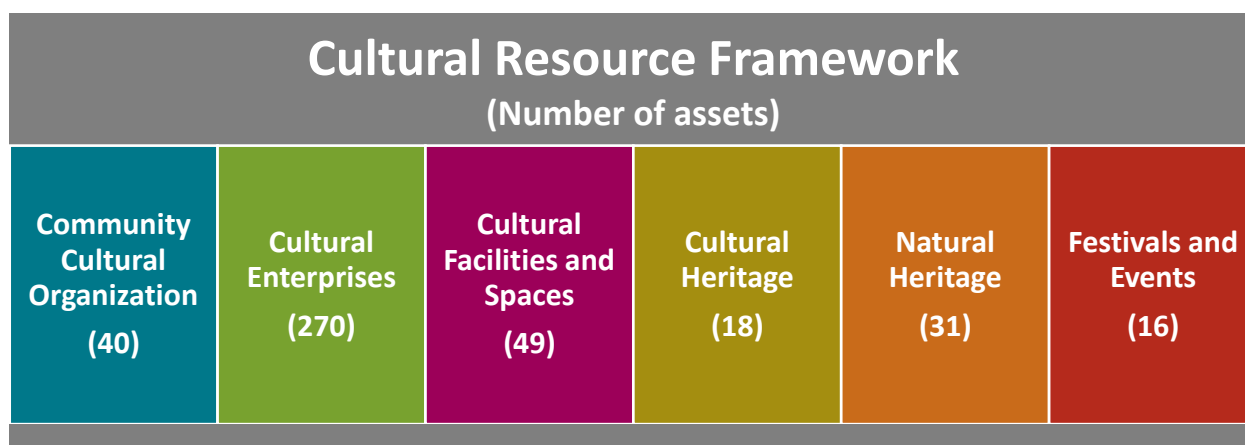
As a result, we know that any quantitative data available for analysis would under-estimate the economic impacts of cultural activity, especially activity that is produced by individuals and smaller community-based non-profit organizations. In addition to these difficulties, quantitative analysis cannot capture the social value of cultural activities. In all cultural asset mapping projects, the most difficult information to collect relates to more grassroots, neighborhood based cultural organizations and activities. This information seldom appears in formal data sources and can only be effectively collected through direct contact with those individuals and organizations.



Cultural Mapping Results

The cultural mappings identified approximately 424 cultural assets in Cobourg. The following figure summarizes the results of the cultural mapping across the six (6) categories.

Figure 1: Overview of Cultural Mapping Findings



Source: MDB Insight, 2018

A complete description of the Cultural Resource Framework categories is provided below:

Community Cultural Organizations

This resource represents community based cultural organizations that are smaller, with often less formal organizational structures, however essential to the cultural vitality of the community.

Assets Include: craft groups, genealogical societies, book clubs, local food groups, choirs, natural heritage groups, theatre groups, and other cultural organizations

Cultural Enterprises

This resource represents a wide range of cultural businesses engaged in the creation and production of cultural goods or services.

Assets Include: antique dealers, artistic representatives, public art gallery, book stores and new dealers, breweries, wineries, local radio stations, craft suppliers, dance studios and instruction, graphic design services, web design and production services, motion picture and video productions, libraries, history museums, musicians, music instruction and studios, photographers, newspaper publishers, and visual art studios

Cultural Spaces and Facilities

This resource represents facilities and spaces where cultural activities take place.

Assets Include: community centres, post-secondary institutions, primary schools, secondary schools, bars with live music, restaurants with live music, performing art venues, railway sites, churches, and motion picture and video exhibition



Cultural Heritage

This resource represents significant cultural heritage sites or resources. Numerous designated heritage properties pay tribute to the City's past.

Assets Include: area walking tour, designated heritage properties, church area walking tour, courthouse area walking tour, railway sites, cemeteries, monuments, plaques, art installations, and murals

Natural Heritage

This resource represents significant natural areas in the City. Assets such as trails, parks, and conservation areas offer rich recreational and community experiences for residents and visitors alike.

Assets Include: conservation areas, local gardens, trees, local parks, local trails, and waterways

Festivals and Events – recurring cultural activities

This resource represents recurring cultural activities. Festivals and events contribute to the animation of public and natural spaces by bringing entertainment, new experiences, and economic impacts to the community.

Assets Include: holiday celebrations, seasonal celebrations, cultural events, farmers market, film events, multicultural events, music festivals, street events, and visual arts events.

Key Findings

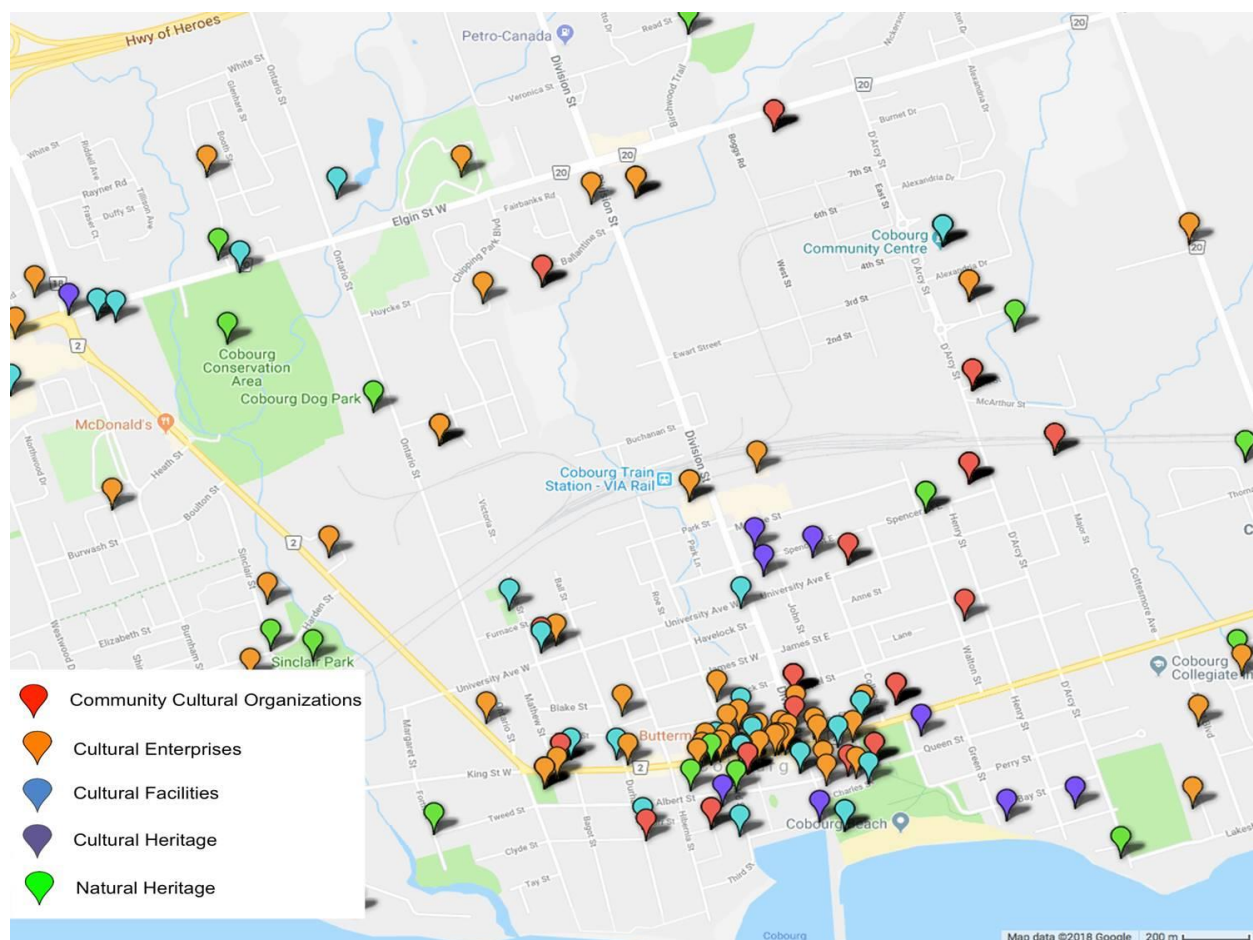
The results of mapping Cobourg's cultural resources (Figure 2) yielded several key findings. The mapping exercise identified a major cluster of cultural activity within Cobourg's Downtown. The results identified that Cobourg's downtown is a major destination for the concentration of cultural enterprises, organizations, facilities/spaces, festivals and events, and heritage preservation. The Downtown is a key area for Cobourg, and has been the subject of several planning studies including the 2016 Downtown Cobourg Master Plan and the 2016 Downtown Vitalization Community Improvement Plan (CIP). These plans have put forward initiatives and programs to further develop the growth and attraction of arts and cultural activity to the Downtown.

The Downtown Cobourg Master Plan identified two nodes (gateways into the Downtown). The mapping results used these gateways to indicate locations with significant concentration of cultural assets. These two nodes are located at the western entrance into Downtown along King Street from Ontario Street and the eastern entrance from College Street.

Lastly, the mapping results identified that there is a wide spread of individual assets across various areas of Cobourg, in particular the number of cultural enterprises that exist across different commercial nodes (ex. along Elgin and County Rd 2).



Figure 2: Cultural Assets in Cobourg



Source: MDB Insight, 2018

Category Examination

Community Cultural Organizations

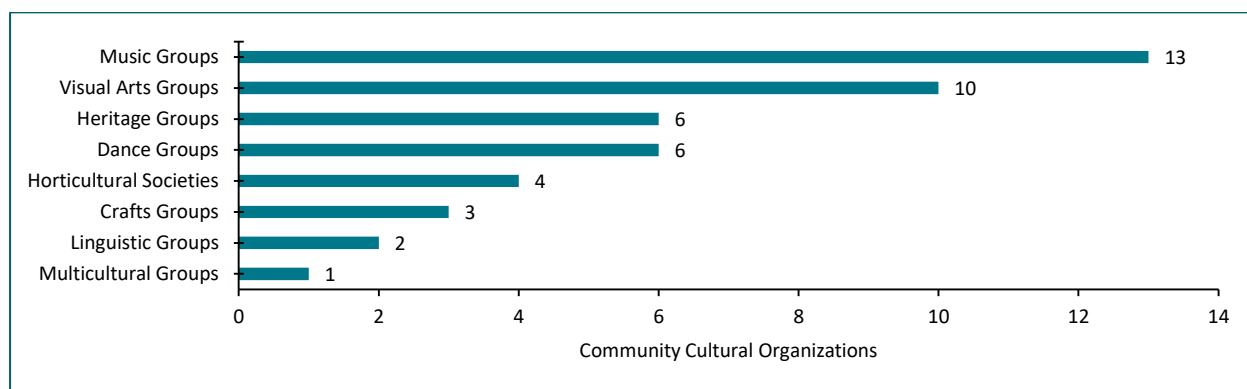
As illustrated in Figure 3, approximately 45 community cultural organizations were identified in Cobourg through the asset mapping process.

The majority of community cultural organizations were music groups, representing 13 assets. These include bands and choirs and music groups such as La Jeunesse Choirs, Oriana Singers of Northumberland and the Royal Canadian College of Organists.

Ten (10) Visual art groups were identified in Cobourg, namely community art organizations including Cobourg Art Club, Shakespeare Street Theatre, Northumberland Players Youth Theatre and the Victorian Operetta Society (VOS) Theatre. Other community cultural organizations in Cobourg include heritage groups, dance groups, horticultural societies, crafts groups and linguistic groups.



Figure 3: Community Cultural Organizations in Cobourg by Category, 2018



Source: MDB Insight, 2018

The mapping process (Figure 4) identified that the majority of community cultural organizations were in Downtown Cobourg along the major gateway at the western entrance of the Downtown core and Division Street and the area close to the marina at Albert Street and Queen Street.

Figure 4: Asset Mapping of Community Cultural Organizations in Cobourg, 2018



Source: MDB Insight, 2018



Cultural Enterprises

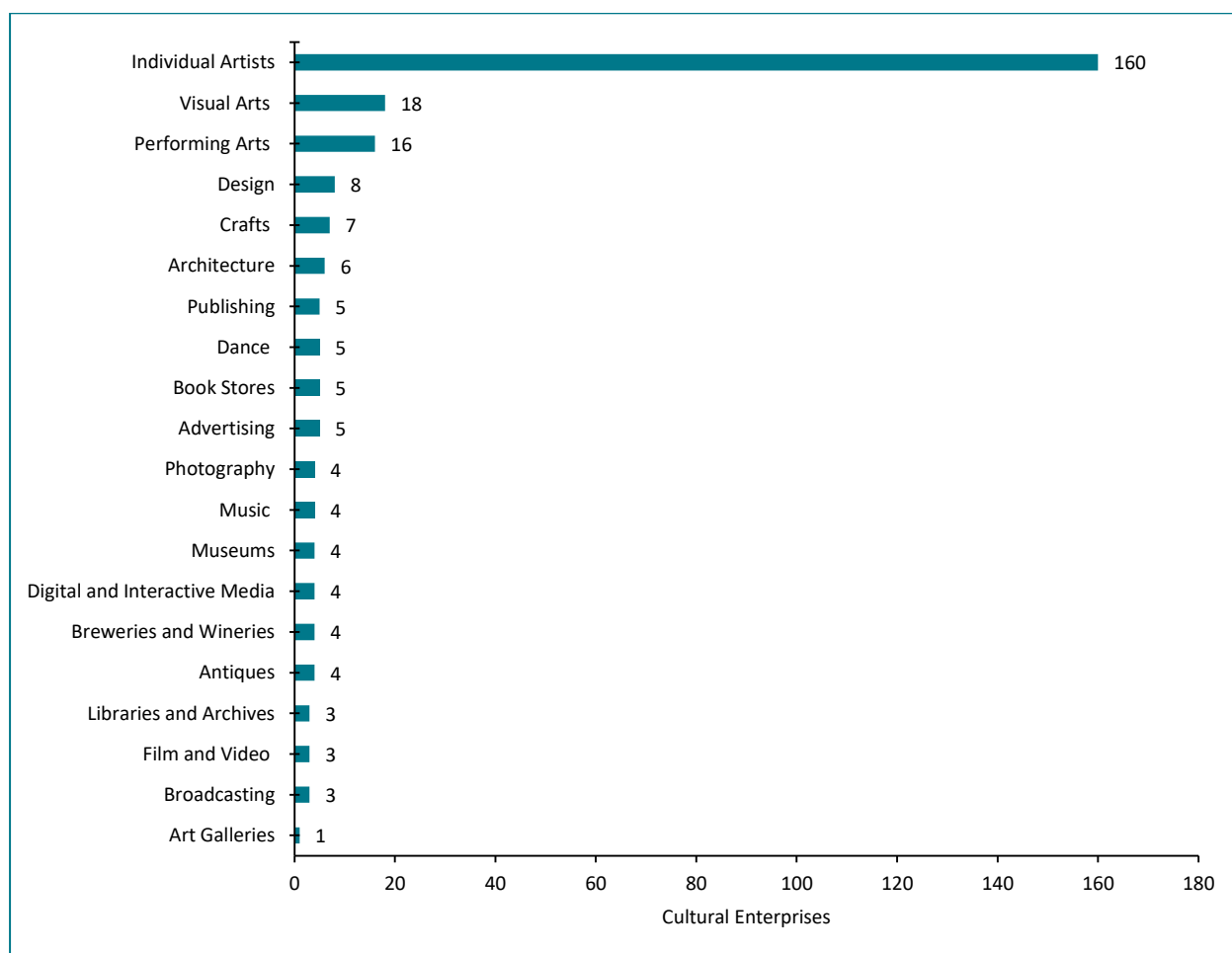
As illustrated in Figure 5, approximately 270 cultural enterprises were identified in Cobourg. The majority of cultural enterprises were individual artists. The data for the individual artists was adapted from the Northumberland Arts Council Archive.

Cobourg also has eighteen (18) visual arts enterprises such as visual artist studios and approximately sixteen (16) performing arts enterprises. Performing arts enterprises include bands and choirs and theatre groups. In addition to providing cultural entertainment in the community, the visual arts and performing arts enterprises can serve as facilities that provide access to, and preserve the culture and hence can be categorized as cultural facilities.

Eight (8) cultural enterprises were design services including graphic design, fashion design, interior design and contemporary hardwood design.

Other cultural enterprises include the Marie Dressler Museum, Cobourg Public Library and the Art Gallery of Northumberland.

Figure 5: Cultural Enterprises in Cobourg by Category, 2018

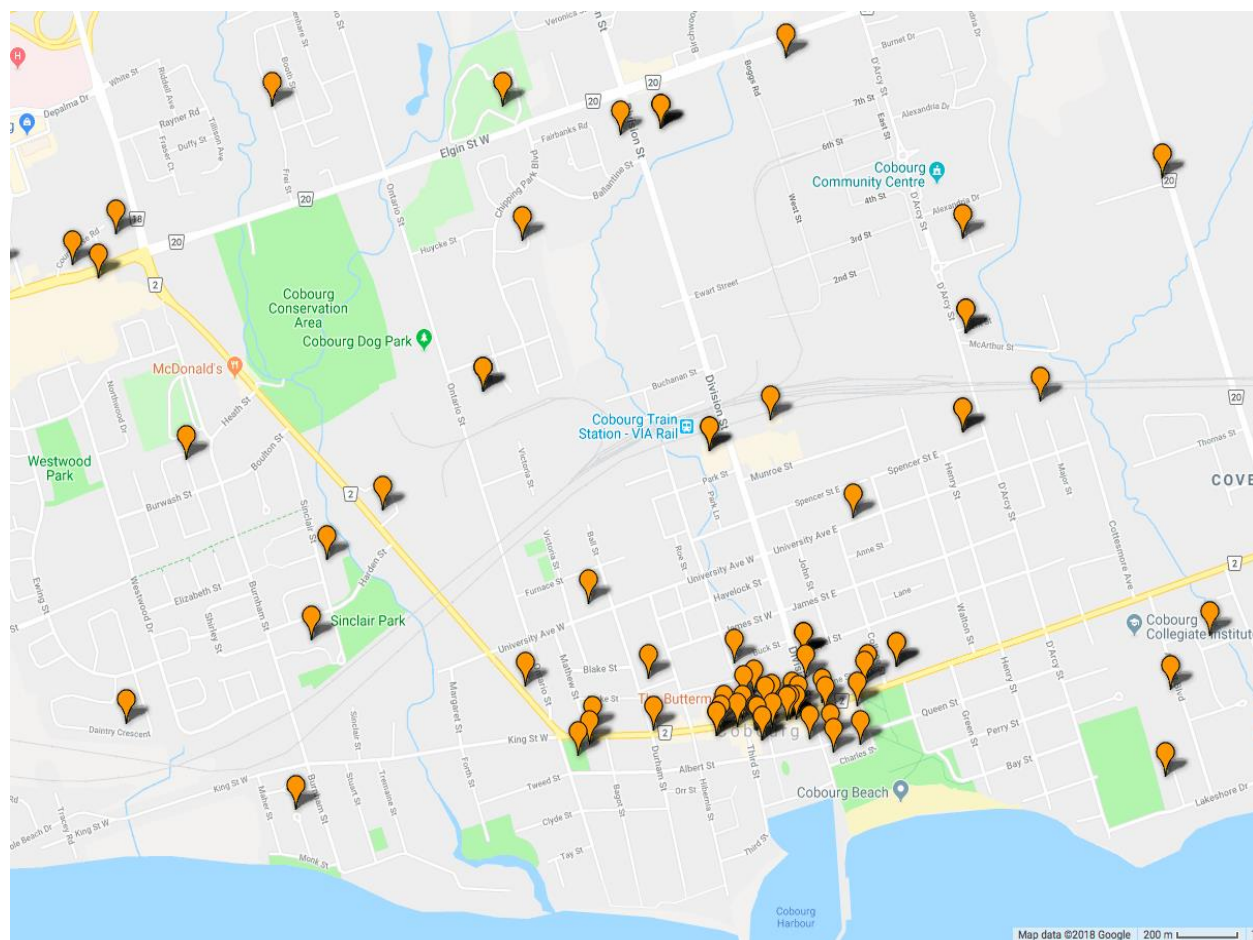


Source: MDB Insight, 2018



The mapping process (Figure 6) identified that the majority of cultural enterprises were seen in the downtown core in the region bound by James Street in the north, marina in the south, Durham Street to the east and College Street to the west. The majority of cultural enterprises are clustered along King Street West. These include visual arts, performing arts and design enterprises. Although 158 individual artists were identified through the inventory, they were not mapped.

Figure 6: Asset Mapping of Cultural Enterprises in Cobourg, 2018



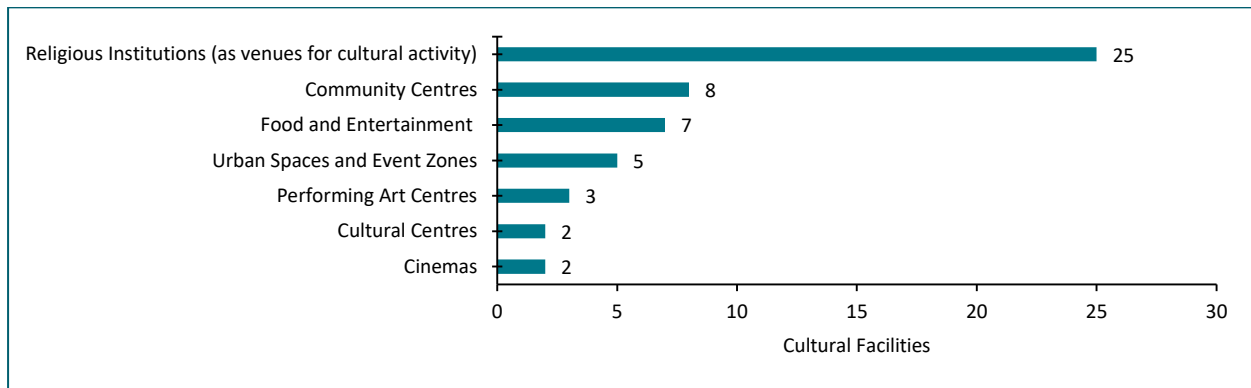
Source: MDB Insight, 2018

Cultural Facilities and Spaces

As illustrated in Figure 7, approximately 52 cultural facilities and spaces were identified in Cobourg. The majority of cultural facilities were Religious Institutions (as venues for cultural activity). Cobourg has eight (8) community centres including the Cobourg Community Centre, Cobourg Public Library and Cobourg Marina. Seven (7) food and entertainment venues were identified as cultural facilities; these include bars and cafes with live music. The Victoria Park Campgrounds is one of the five urban spaces and event zones in Cobourg.



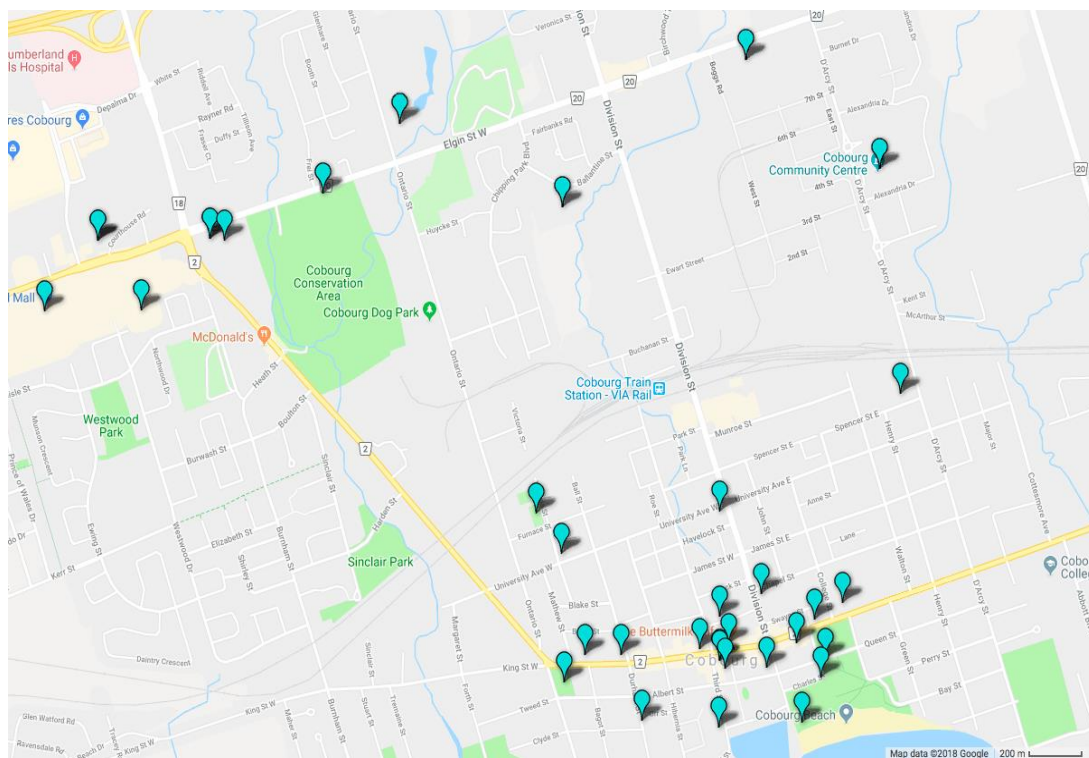
Figure 7: Cultural Facilities and Spaces in Cobourg by Category, 2018



Source: MDB Insight, 2018

The mapping process (Figure 8) identified that the majority of cultural facilities and spaces were along the Downtown Core. The major cluster was identified to be along King Street W, from the major gateway at King Street W and Ontario Street to the major gateway at College Street at the West. The cluster is bound to the North by James Street W and the marina at the South. Cultural facilities and spaces were also identified along the Cobourg Conservation Area and include Fleming College Campus, Rainbow Cinema Cobourg, religious institutions and restaurants with event space. The Victoria Park Campground is also identified as an urban and event space.

Figure 8: Asset Mapping of Cultural Facilities in Cobourg, 2018



Source: MDB Insight, 2018

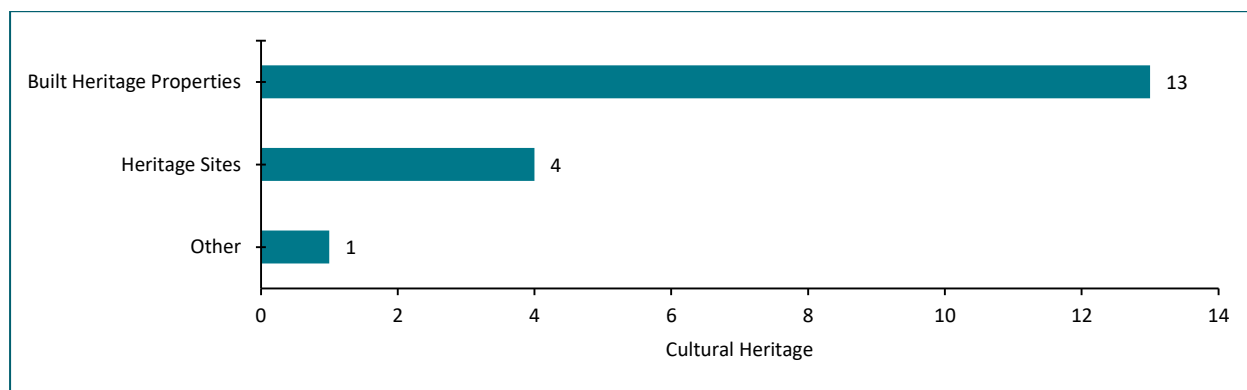


Cultural Heritage

As illustrated in Figure 9, approximately 18 cultural heritage assets were identified in Cobourg. The majority of these assets were built heritage properties. Four (4) heritage sites were also identified. A unique cultural heritage asset of Cobourg is the town crier.

In addition to the heritage assets identified through the mapping process, Cobourg has an updated repository of heritage assets. Over 760 properties are identified in the Heritage Register. The Heritage Register is managed by the Planning Department. The Cobourg Heritage Advisory Committee supervises the addition of properties to the registry.

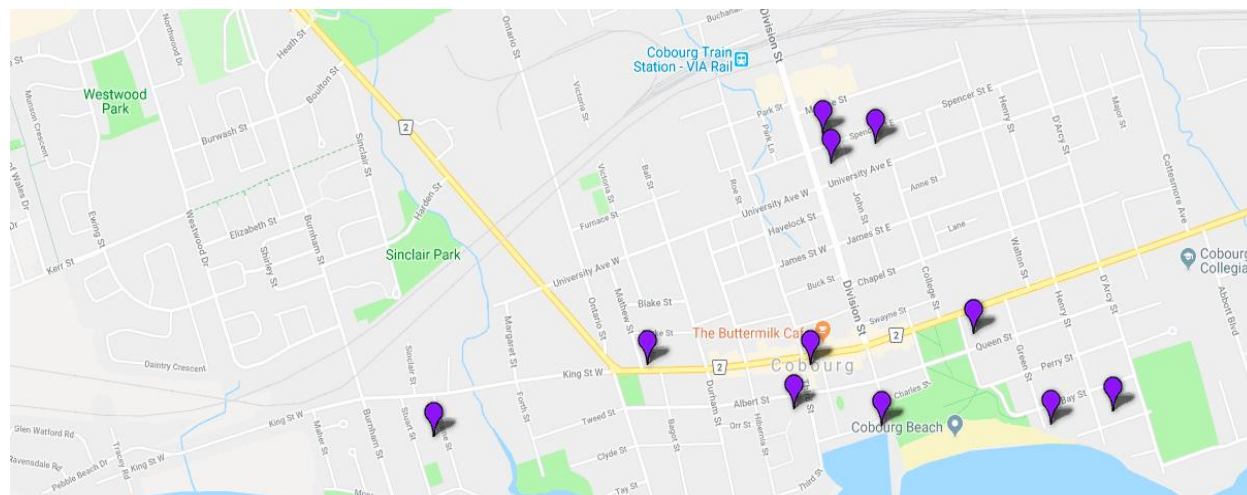
Figure 9: Cultural Heritage Assets in Cobourg by Category, 2018



Source: MDB Insight, 2018

The mapping process (Figure 10) identified cultural heritage assets were along the harbour and King Street West. The cultural heritage assets identified include the Cobourg East Pier, King George Inn, Marie Dressler House and the Victoria Hall Concert Hall. There is a small cluster of heritage properties on Division Street and Spencer Street East, including Victoria College, The Poplars and the Woodlawn Inn.

Figure 10: Asset Mapping of Cultural Heritage Assets in Cobourg, 2018



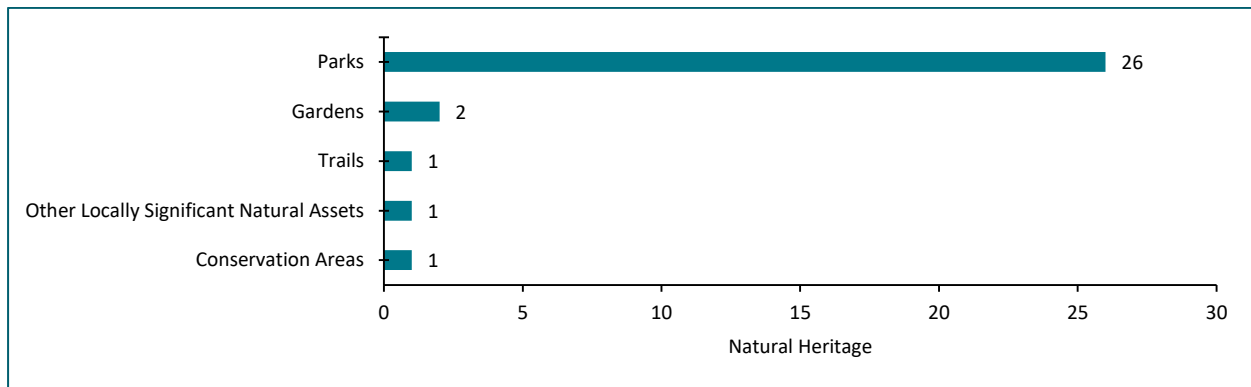
Source: MDB Insight, 2018



Natural Heritage

As illustrated in Figure 11, approximately 31 natural heritage assets were identified in Cobourg. The majority of assets are local parks. Cobourg is also home to the Cobourg Beach, a significant natural asset. The beach hosts the annual Sandcastle Festival and other community events.

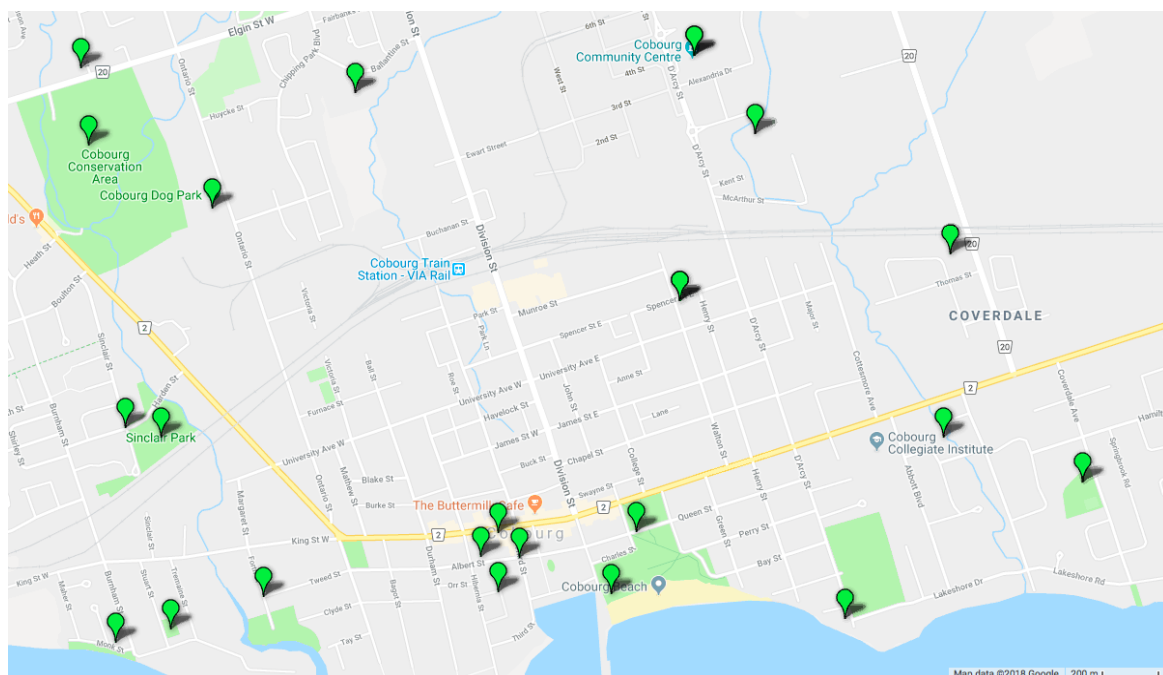
Figure 11: Natural Heritage Assets in Cobourg by Category, 2018



Source: MDB Insight, 2018

The mapping process (Figure 12) identified that the majority of natural heritage assets were dispersed around the Town. A minor cluster was identified in the major gateway entrance into Downtown along King Street from Ontario Street. A few significant parks in Cobourg are Monk's Cove Park, Peace Park, and Victoria Park located along the waterfront. Cobourg has one conservation area located on Elgin Street West and Ontario Street.

Figure 12: Asset Mapping of Natural Heritage Assets in Cobourg, 2018



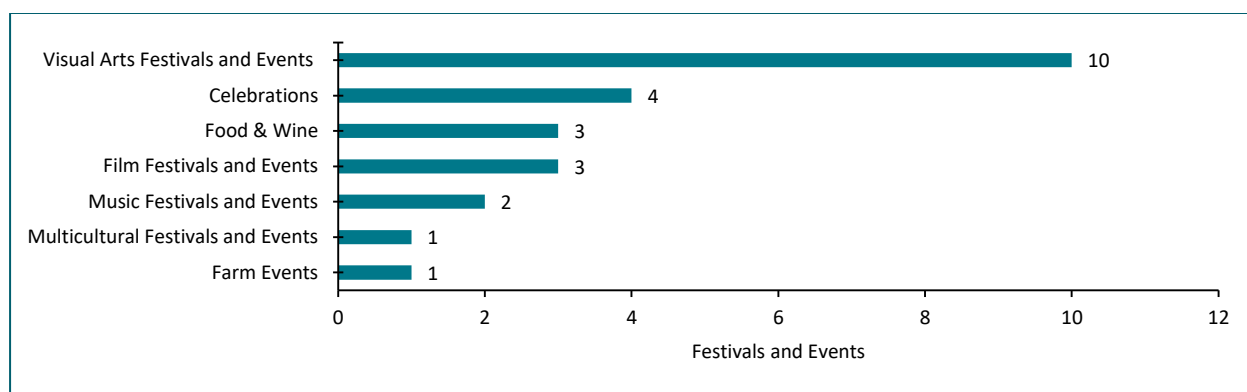
Source: MDB Insight, 2018



Festivals and Events – recurring cultural activities

As illustrated in Figure 13, approximately 24 festivals and events (recurring cultural activities) were identified in Cobourg. The festivals and events identified through this cultural mapping process identify recurring cultural activities in the community. Ten (10) visual art festivals and events were identified including the Sandcastle Festival & Downtown Sidewalk Sale, Busker & Art Festival, Cobourg Beach Courtyard Summer Series and the Art Walk & Pub Crawl. Three (3) food festivals were identified, namely, Cobourg Waterfront Festival, Rotary Ribfest and Harvest Festival. The Cobourg Farmers' Market and the Cobourg Highland Games Festival are other major festivals and events in Cobourg.

Figure 13: Festivals and Events in Cobourg by Category, 2018



Source: MDB Insight, 2018



Section Two

Plans and Policy Review





Section Two

Plans and Policy Review

Part of the completion of a Cultural Master Plan is an internal review of all relevant municipal plans and policies that currently – or potentially – have connections to the Cultural Master Plan. Relevant regional plans and strategies (e.g., Northumberland Council) are also examined. A review and synthesis of these reports provide a clear picture of the larger planning within which the Cultural Master Plan is developed.

The following plans and official documents were examined for this report:

- Waterfront User Needs Assessment & Detailed Design (June 2018)
- Cobourg Economic Development & Tourism Strategic Plan (2015-2018)
- Town of Cobourg Strategic Plan (2015-2018)
- Downtown Cobourg Master Plan (2016)
- Downtown Vitalization Community Improvement Plan (CIP) 2016
- Town of Cobourg Heritage Master Plan (2016)
- Cobourg Tourism Investment Opportunity Study (2015)
- Cobourg Marketing Plan (2013-2015)
- Town of Cobourg Parks Master Plan (2013)
- Downtown Cobourg Vitalization Residents Survey (2013)
- Downtown Cobourg Vitalization Business Owners Survey (2013)
- Town of Cobourg Official Plan (2010)

Theme Identification

The following key themes were identified in the review of the documents listed above:

Downtown Vitalization

Downtown vitalization is integral for future economic success of the town. As expressed in the reviewed documents, the vitality of Cobourg hinges on the success and maintaining the integrity of the downtown core. A revitalized downtown attracts both residents and tourists and helps promote local businesses and the vibrant heritage and Victorian charm of the town. Without a vibrant downtown, there is a fear of Cobourg becoming a bedroom community where residents work and shop in neighbouring communities and cities. The Downtown Vitalization enhances the arts and cultural aspects of the town and promotes the town's heritage while improving quality of place.

Waterfront Development

Waterfront development has been pivotal for the community and is seen as a catalyst for the development of Cobourg. While many of these pieces are interconnected, waterfront development is arguably the initial factor for bringing about the desired changes in Cobourg.



Waterfront development is also essential to downtown vitalization. Waterfront enhancement encourages more tourism in the area and promotes the healthy lifestyle Cobourg advocates. There is also the potential for additional income streams for the town with recreational opportunities and the marina. The waterfront provides a critical link to the economic sustainability of Cobourg's downtown. A waterfront needs assessment was conducted and published in 2018 which outlined several recommendations to further improve the waterfront. Recommendations included items such as improving access and connections, creating spacing for all groups including boaters, water sports, and more; and improving walkways, planting, and habitat opportunities.

Heritage

In nearly every municipal document that was reviewed, there was mention of heritage and how it is an integral part of Cobourg's identity. Heritage was discussed in the context of downtown vitalization, tourism, the overall atmosphere of the town, and quality of place. Plans pointed to the downtown core as being the heart of Cobourg's heritage characterized by colonial low rise buildings, streetscapes, historical buildings, and the small town feel. It is evident that there is a significant amount of pride associated with Cobourg's heritage, with several plans addressing the preservation of assets as small as heritage street lights. Cobourg has developed a Heritage Master Plan which provides a management framework for built heritage resources, cultural heritage landscapes, archaeological sites, and development within heritage conservation districts throughout the Town.

Outdoor and Active Lifestyle

Municipal documents also make mention of promoting Cobourg's outdoor and active lifestyle from the use of trails and parks, to the waterfront, and the myriad of recreation opportunities for all ages. As identified in one vision *"...As the economic hub of Northumberland County, it will deliver accessible experiences and opportunities generated from local agriculture, environmental consciousness and active, health-centred living."* Some of the top identified strategic advantages for the town included the walking and bike paths throughout the town and along the water, water sports, outdoor parks, and campgrounds – all of which encourage this outdoor lifestyle. Other assets mentioned included festivals and events, and the Cobourg Community Centre. Plans focused on promoting these assets from a business and tourism perspective, and as inherent qualities of the lifestyle in Cobourg.

Partnership and Community Support

Many plans cite the need to create partnerships to ensure the success and implementation of initiatives. The need for partnership and community support is fundamental in being able to leverage the necessary funding by pooling the resources of multiple organizations from a financial perspective and also a resource perspective. Achieving community support and having buy-in for these initiatives improves the likelihood of their success and, and is an additional channel for resources in the form of volunteering. Much of the success Cobourg has experienced with efforts such as the Downtown Vitalization project has been attributed to strategic partnerships and strong community support.



Plan Overview

The Table below represents an overview of key documents reviewed in association with the Cobourg Cultural Master Plan.

Document	Purpose	Key Highlights
Waterfront User Needs Assessment & Detailed Design (2018)	The collectively directs future actions towards a long-term vision for Cobourg's waterfront. The final plan balances community use and natural heritage consideration with visitor related economic objectives.	<p>Key Findings</p> <ul style="list-style-type: none"> ▪ An active harbour is important and boat service/storage should not be reduced ▪ Tourism is important to the local economy ▪ Keep the campground and do not develop a waterfront hotel ▪ Provide greater access to more users and maintain or increase special event functions at Victoria Park ▪ Large majority indicated need for improvements – either minor or major- to the waterfront ▪ Provide non-motorized craft drop-off zones/launch points; additional amenities such as change rooms, washrooms, additional food services ▪ Pursue revenue-generating waterfront based recreation opportunities ▪ Have experienced stable to increasing trends in tourist/visitor-generated income in the past five to ten years ▪ Majority oppose paying for waterfront improvements directly <p>Recommendations</p> <ul style="list-style-type: none"> ▪ Consensus on enhancing headland as more passive area focused on naturalization ▪ Limit access to headland – no access to breakwall ▪ Improve walkways, planting, habitat, seating and interpretation opportunities ▪ Improve access and connections ▪ Space available for all groups including slips on west side of centre pier, paddling/water sports, and migratory birds ▪ Dredging needs to be continued and expanded in pockets to keep harbour operational for marina and water sports



Document	Purpose	Key Highlights
Cobourg Economic Development & Tourism Strategic Plan (2015-2018)	To attract and grow businesses and tourism in a fiscally responsible, timely and innovative manner	<p>Vision: Cobourg is growing with businesses that are healthiest in Ontario</p> <p>Key objectives of the plan</p> <ul style="list-style-type: none"> ▪ Execution of the Downtown Vitalization Action Plan ▪ Marketing for Service/Retail Business Attraction ▪ Manufacturing attraction with focused targeted markets ▪ Business Attraction & Retention ▪ Develop a four seasons Tourism Strategy <p>Strategic Actions that relate to the cultural plan include</p> <ul style="list-style-type: none"> ▪ Complete the business and consumer attraction component of Downtown Vitalization (2016) ▪ Execute signage and property enhancements (2016/2017) ▪ Complete the Community Improvement Venture Initiative (2016) ▪ Complete the Downtown Master Plan integrating the Heritage Master Plan (2016) ▪ Update and execute Victoria Square Precinct Plan (2017/2018) ▪ Obtain public input on use of Victoria Park Campground as a site for a potential Four Season Tourism Attraction (2016) ▪ Develop & implement a marketing & promotion program to target businesses - integrate this with other strategic partners (Ongoing) ▪ Leverage the Cultural Master Plan components for business attraction (2016/2017) ▪ Support an entrepreneurial business hub (2016) ▪ Market to young entrepreneurs that Cobourg is THE place to live and set up a business - that perhaps sells to the world (2017/18) ▪ Research and develop local training/skills upgrading to develop a trained workforce and meet the needs of local businesses; data collection of labour demand, supply side (2016) ▪ Corporate Calling Program (2016) ▪ Create targeted marketing plans leveraging key partners for retail/service businesses including video, testimonials, online newsletters/blogs that create awareness and excitement to shop and support local businesses (Ongoing) ▪ Update municipal development by-laws conducive to business that fit our vision for Cobourg (Ongoing) ▪ Product development (Ongoing/New 2016) ▪ Extending the reach of the message (Ongoing/New 2016) ▪ Delivering the experience (Ongoing) <p>Events enhancement (Ongoing/New 2016)</p>



Document	Purpose	Key Highlights
Town of Cobourg Strategic Plan (2015-2018)	The Strategic Plan serves as the Town's highest-level policy document and provides strategic priorities that guide the work of the Town, decisions and development of the community.	<p>Vision: Cobourg, a progressive, vibrant lakeside community, honouring our past and embracing our future.</p> <p>Objectives:</p> <ul style="list-style-type: none"> ▪ Developing and implementing a community waterfront district plan ▪ Supporting the preservation and enhancement of the Town's recreation, arts, culture and heritage ▪ Promoting diverse economic development opportunities ▪ Managing sustainable growth development ▪ Improving efficiencies and effectiveness in municipal operations
Downtown Cobourg Master Plan (2016)	The Plan addresses key challenges and opportunities to ensure that future change can be effectively managed to positively contribute to the health, beauty and vitality of the Downtown. The Master Plan is a strategic document that communicates the vision, goals, and direction to the public, external agencies, and investors	<p>Vision: The Vision for Downtown Cobourg is the basis for the recommendations of the Vitalization Action Plan. It celebrates landmark buildings and valued open spaces and imagines new legacies. It extends the historic walkable pattern of streets and open spaces to the Waterfront. It includes new places to enjoy the Lake and Downtown's cultural, recreational, and retail amenities.</p> <p>The Master Plan contains:</p> <ul style="list-style-type: none"> ▪ downtown strategy ▪ urban design guidelines ▪ implementation tools to assist the Town in guiding new development, investment and community building initiatives in Downtown Cobourg for the next 10 to 20 years <p>Key Considerations:</p> <ul style="list-style-type: none"> ▪ Drive downtown change ▪ Competitive Advantage: Rich historic fabric, High quality public realm and waterfront, pedestrian-scale retail, vibrant cultural amenities and activities ▪ Monitoring and Adjustments



Document	Purpose	Key Highlights
Downtown Vitalization Community Improvement Plan (CIP) (2016)	To identify the key community improvements needs in Downtown Cobourg, establish a Community Improvement Project Area, and outline the public realm improvements and a toolbox of incentive programs that will stimulate private sector investment activity in the Project Area.	<p>Vision: Downtown Cobourg is Ontario's foremost cultural and recreational small town destination forged from a beautifully preserved historic community on the waterfront. As the economic hub of Northumberland County, it will deliver accessible experiences and opportunities generated from local agriculture, environmental consciousness and active, health-cantered living.</p> <p>The public realm improvements generally include:</p> <ul style="list-style-type: none"> ▪ Gateway signage and structures ▪ Wayfinding signage ▪ Implementing the public realm and design recommendations contained in the Victoria Square Plan, Waterfront Master Plan and other key plans that apply to the Downtown\Improvements to the pedestrian environment, e.g., sidewalks, paths, street furniture and landscaping ▪ Acquisition and improvement of public open spaces ▪ Enhancements to municipal parking areas ▪ Improvements to heritage features such as heritage street lighting ▪ Continued expansion of major Downtown attractors such as the market and Victoria Square, the Waterfront and Marina <p>Incentives:</p> <ul style="list-style-type: none"> ▪ Specific programs of the CIP may be offered at the discretion of Council and may be established or rescinded by Council ▪ Will be essential for the Town to monitor the progress of development and renovations in the Downtown in order to ensure that the relevant incentives are appropriate for specific needs over time ▪ The need for partnership ▪ Pooling ideas and sharing of responsibilities



Document	Purpose	Key Highlights
Town of Cobourg Heritage Master Plan (2016)	The Heritage Master Plan provides an overall vision and goals for heritage conservation and management through the Town.	<p>Vision: To conserve and enhance cultural heritage resources and manage change so that the community can continue to grow in keeping with the heritage character of Cobourg while also preserving the vibrant small-town feel.</p> <p>Goals of the Heritage Master Plan</p> <ul style="list-style-type: none"> ▪ Protect and conserve significant cultural heritage resources over the long term ▪ The small-town character of Cobourg, typified by the commercial core, low rise development, comfortable streetscapes, and a mix of land uses, is important to maintain and enhance ▪ Important to have the downtown as the economic cultural hub of the Town to retain the small-town character ▪ The waterfront is a significant defining feature of the community that provides a critical link to the downtown and an important recreational area ▪ Retaining the broader character of the streetscape and neighbourhoods is equally important to conserving individual buildings ▪ Investment and new development that is compatible with the character of the surrounding area should be encouraged and facilitated



Document	Purpose	Key Highlights
Cobourg Tourism Investment Opportunity Study (2015)	The study determined key areas of tourism opportunities for Cobourg and made recommendations on the priority opportunities.	<p>The overall objectives of this project were:</p> <ul style="list-style-type: none"> ▪ To screen and assess the investment readiness of tourism sites/properties in the Downtown study area. The sites to be considered were identified by the Town. ▪ Define preliminary tourism project development concepts for the highest potential opportunities, describing the opportunities and the challenges in realizing the investment. ▪ Identify the potential economic impacts that might be associated with the highest potential opportunities. ▪ Prepare a marketing/sales document for the selected priority opportunities. <p>Tourism Assets</p> <ul style="list-style-type: none"> ▪ Cobourg has a number of important tourism assets, (called USPs or unique selling propositions), that other communities either do not have or at least not to the same extent. These include: ▪ Victoria Beach – not only is this one of the best beaches on Lake Ontario, it is close to Cobourg’s downtown core, Victoria Park, Victoria Park Campground – right on the beach, Victoria Hall, Waterfront trail and boardwalk, Cobourg Marina ▪ Other tourism assets include: Festivals and events, art gallery, historic community, sports centre and YMCA, community theatre and other live performances, heritage downtown with shopping and dining <p>Target Markets for Cobourg</p> <ul style="list-style-type: none"> ▪ Family Memory Builders, Connected Explorers, Mellow Vacationers ▪ Best Cobourg Tourism Investment Opportunities: ▪ Boutique waterfront inn/suites with restaurant, spa, meeting space, New Campground/Trailer Park, Waterfront Restaurant, Mini-golf attraction complex



Document	Purpose	Key Highlights
Cobourg Marketing Plan (2013-2015)	Strategic marketing and new product development with a mandate "To grow Cobourg's tourism sector year-round by stimulating increased consumer spending and visits."	<p>Vision: To make Cobourg the premier, four-season travel destination by offering our visitors diverse and quality experiences that make it easy for them to have a great time.</p> <p>Key objectives of the plan</p> <ul style="list-style-type: none"> ▪ Partnership Development - coordinating market-ready products ▪ Marketing - strengthening the Cobourg Brand ▪ Planning - research and formulation of tourism direction and strategies ▪ Media Relations - cultivate relationships and communicate effectively ▪ Performance Measures - improving the evaluation process <p>Key Programs under these objectives include:</p> <ul style="list-style-type: none"> ▪ Enhance cobourgtourism.ca ▪ Improve Media Relations ▪ Strengthen the Cobourg Brand ▪ Focus on 'Explore More' Campaigns, Photo Contest and Shoulder Season Campaign ▪ Performance Evaluations through customer satisfaction, sales per customer, response per campaign and dollars invested and new visitor acquisitions



Document	Purpose	Key Highlights
<p>Town of Cobourg Parks Master Plan (2013)</p>	<p>Provides a strategy for achieving the Town's vision for a strong, livable and healthy community. The Plan recognizes the importance of parks and their role in building healthy communities and developing green infrastructure.</p>	<p>Key goals to guide the plan</p> <ul style="list-style-type: none"> ▪ Develop the parks system as an icon and defining feature of Cobourg ▪ Create an integrated and connected network of park and public open spaces ▪ Develop the parks system to provide a wide range of gathering, recreation, education and cultural experiences ▪ Preserve, protect and enhance the natural environment of Cobourg ▪ Ensure residents and park users have complete access to all parks and equal opportunity to participate in the parks system ▪ Supply and deliver parks, facilities and service to the public in an efficient/ effective manner ▪ Enhance the urban waterfront as the primary attraction and premier destination in Cobourg <p>To achieve the goals of the Parks Master Plan a system-based concept was developed. The concept defines the park system as having three distinct elements</p> <ul style="list-style-type: none"> ▪ Connections: Park system is united with connections that link together all parts of the community with green corridors and nodes ▪ Activities: Park system has a variety of activities that serve to meet the needs of the community ▪ Experiences: Park system provides experiences that are memorable and unique to the community



Document	Purpose	Key Highlights
Downtown Cobourg Vitalization Residents Survey (2013)	This report describes the results of a Residents Survey that was conducted as part of the Downtown Cobourg Vitalization project.	<p>Aim of the survey was to collect information about the following issues</p> <ul style="list-style-type: none"> Residents' use and opinions of Downtown businesses The appearance of Downtown The activities that residents enjoy Downtown Additional services or facilities that may be needed Downtown <p>Top challenges</p> <ul style="list-style-type: none"> Vacant business premises Limited options in terms of products and services Beautification/Amenities Top initiatives that could benefit Downtown Storefronts – Vacancies <p>Goods & service – Variety</p> <ul style="list-style-type: none"> Businesses – Retention & stability Business – Appropriate variety Businesses – Uniform opening hours Storefronts – Appearance of facades
Downtown Cobourg Vitalization Business Owners Survey (2013)	This report describes the results of a Business Owners Survey conducted as part of the Downtown Cobourg Vitalization project.	<p>Aim of the survey was to collect information about the following issues</p> <ul style="list-style-type: none"> Current business “climate” in Downtown Cobourg, including sales patterns and impact of events The opportunities and challenges faced by business owners Owners' plans for business development Owners' opinions about the support provided to Downtown businesses <p>Top challenges</p> <ul style="list-style-type: none"> Parking Littering Vagrancy and loitering Inconsistent business hours, restrictive bylaws and taxes, and business turnover are disadvantages of operating Downtown <p>Top initiatives that could benefit Downtown</p> <ul style="list-style-type: none"> Improved parking Marketing to local residents Beautification Reduction of vacancies Animation / Events



Document	Purpose	Key Highlights
Town of Cobourg Official Plan (2010)	The Official Plan of the Town of Cobourg establishes a framework for the future planning of the community	<p>The plan provides:</p> <ul style="list-style-type: none">▪ An overall vision for the community▪ Policies for the maintenance and enhancement of the existing community structure, as well as the management of future change▪ Policies to ensure that the level of services provided is consistent with the financial capabilities and resources of the municipality as established by Council▪ A framework to guide the municipality in carrying out more detailed steps in the planning process



Section Three

Cultural Labour Force





Section Three

Cultural Labour Force

The cultural labour force assessment was conducted for the Town of Cobourg to illustrate the current nature and composition of cultural goods and services in the community and contributions to economic growth. A comparative assessment was also completed to understand 'how the Cultural Industry in Cobourg is performing relative to comparable communities' and provide evidence of investment in the sector by other communities. The peer communities compared in this assessment are Prince Edward County, Belleville, Port Hope, Port Colborne and Niagara-on-the-Lake.

The cultural industry employment, cultural occupations, cultural industries and cultural value chain were studied. The analysis was conducted using the North American Industry Classification System (NAICS) and the National Occupational Classification (NOC) as they relate to the cultural sector.

- Cultural Industry Employment: identified based on the NAICS 2012. Refers to the total labour force population aged 15 years and over who work in cultural industries
- Cultural Occupations: identified based on the NOC 2016. Refers to the kind of work performed by persons aged 15 years and over whose job title and the description of the main activities is related to a cultural role
- Cultural Industries and Cultural Value Chain: identified based on the NAICS 2012. It refers to the number and nature of industries in the cultural industry and is measured by examining the size of establishments, the type of establishments and the illustration of the value chain for the industry.

Local Concentration by Location Quotient (LQ)

- An LQ measures the concentration of business activity in a local area (e.g. Cobourg) relative to an over-arching area (e.g. Ontario). An LQ of over 1.25 suggests a local relative concentration of activity. In theory, this suggests the local sector is exceeding local demand, and exporting products/services to areas outside of the local community. A sector LQ of less than 0.75 suggests a gap area, where the local business community is theoretically falling short of local demand. From a labour force perspective, LQs may offer insight into where local concentrations of industry-relevant skills may exist.

Definition

The cultural labour force definition is based on the Statistics Canada's Canadian Framework for Cultural Statistics. The framework is a collaborative effort of the Culture Statistics Program of Statistics Canada and the Department of Canadian Heritage.

- Cultural Industries - defined using the North American Industry Classification System (NAICS) codes at the six-digit level
- Cultural Occupations - defined using the National Occupational Classification (NOC) at the four-digit level



Cultural Industries

Industry	NAICS	Description
Manufacturing	312120	Breweries
	312130	Wineries
	323119	Other printing
	323120	Support activities for printing
Wholesale trade	414420	Book, periodical and newspaper merchant wholesalers
	414440	Sound recording merchant wholesalers
Retail trade	442292	Print and picture frame stores
	451140	Musical instrument and supplies stores
	451310	Book stores and news dealers
	453920	Art dealers
Information and cultural industries	511110	Newspaper publishers
	511120	Periodical publishers
	511130	Book publishers
	511140	Directory and mailing list publishers
	511190	Other publishers
	511211	Software publishers (except video game publishers)
	511212	Video game publishers
	512110	Motion picture and video production
	512120	Motion picture and video distribution
	512130	Motion picture and video exhibition
	512190	Post-production and other motion picture and video industries
	512230	Music publishers
	512240	Sound recording studios
	512250	Record production and distribution
	512290	Other sound recording industries
	515110	Radio broadcasting
	515120	Television broadcasting
	515210	Pay and specialty television
	517310	Wired and wireless telecommunications carriers (except satellite)
	517919	All other telecommunications
	519121	Libraries
	519122	Archives
	519130	Internet broadcasting and web search portals
	519190	All other information services



Industry	NAICS	Description
Finance and insurance	526989	All other miscellaneous funds and financial vehicles
Real estate and rental and leasing	532210	Consumer electronics and appliance rental
Professional, scientific and technical services	541310	Architectural services
	541320	Landscape architectural services
	541340	Drafting services
	541410	Interior design services
	541420	Industrial design services
	541430	Graphic design services
	541490	Other specialized design services
	541514	Computer systems design and related services (except video game design and development)
	541515	Video game design and development services
	541810	Advertising agencies
	541830	Media buying agencies
	541840	Media representatives
	541850	Display advertising
	541860	Direct mail advertising
	541870	Advertising material distribution services
	541891	Specialty advertising distributors
	541899	All other services related to advertising
	541920	Photographic services
	541930	Translation and interpretation services
Educational services	611610	Fine arts schools
Arts, entertainment and recreation	711111	Theatre (except musical) companies
	711112	Musical theatre and opera companies
	711120	Dance companies
	711130	Musical groups and artists
	711190	Other performing arts companies
	711311	Live theatres and other performing arts presenters with facilities
	711321	Performing arts promoters (presenters) without facilities
	711322	Festivals without facilities
	711511	Independent visual artists and artisans
	711512	Independent actors, comedians and performers
	711513	Independent writers and authors
	712111	Non-commercial art museums and galleries
	712115	History and science museums



Industry	NAICS	Description
	712119	Other museums
	712120	Historic and heritage sites
	712130	Zoos and botanical gardens
	712190	Nature parks and other similar institutions
	713110	Amusement and theme parks
	713120	Amusement arcades
	713210	Casinos (except casino hotels)
	713291	Lotteries
	713299	All other gambling industries
	713910	Golf courses and country clubs
	713920	Skiing facilities
	713930	Marinas
	713940	Fitness and recreational sports centres
	713950	Bowling centres
	713991	Sports clubs, teams and leagues performing before a non-paying audience
	713992	Other sport facilities
	713999	All other amusement and recreation industries
Accommodation and food services	722511	Full-service restaurants
Other services (except public administration)	812921	Photo finishing laboratories (except one-hour)

Cultural Occupations

NOC	Description
0511	Library, archive, museum and art gallery managers
0512	Managers - publishing, motion pictures, broadcasting and performing arts
1123	Professional occupations in advertising, marketing and public relations
1213	Supervisors, library, correspondence and related information workers
1423	Desktop publishing operators and related occupations
1451	Library assistants and clerks
1452	Correspondence, publication and regulatory clerks
2151	Architects
2152	Landscape architects
2225	Landscape and horticulture technicians and specialists
2233	Industrial engineering and manufacturing technologists and technicians
2251	Architectural technologists and technicians



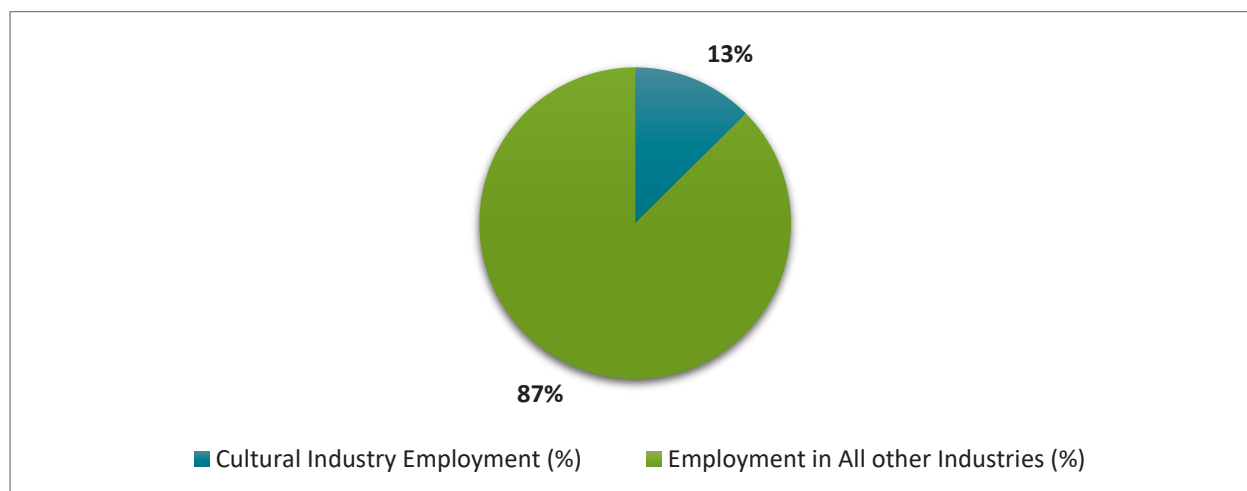
NOC	Description
2252	Industrial designers
2253	Drafting technologists and technicians
5111	Librarians
5112	Conservators and curators
5113	Archivists
5121	Authors and writers
5122	Editors
5123	Journalists
5125	Translators, terminologists and interpreters
5131	Producers, directors, choreographers and related occupations
5132	Conductors, composers and arrangers
5133	Musicians and singers
5134	Dancers
5135	Actors and comedians
5136	Painters, sculptors and other visual artists
5211	Library and public archive technicians
5221	Photographers
5222	Film and video camera operators
5223	Graphic arts technicians
5224	Broadcast technicians
5225	Audio and video recording technicians
5226	Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts
5227	Support occupations in motion pictures, broadcasting, photography and the performing arts
5231	Announcers and other broadcasters
5232	Other performers, n.e.c.
5241	Graphic designers and illustrators
5242	Interior designers and interior decorators
5243	Theatre, fashion, exhibit and other creative designers
5244	Artisans and craftspersons
5245	Patternmakers - textile, leather and fur products
7303	Supervisors, printing and related occupations
7381	Printing press operators
9471	Plateless printing equipment operators
9472	Camera, platemaking and other prepress occupations
9473	Binding and finishing machine operators
9474	Photographic and film processors



Cultural Industry Employment

In 2016, the cultural industry in Cobourg comprised 1,754 employees. As indicated in Figure 14, the cultural industry accounted for 13% of total industry employment. The percentage of employment in the cultural industry in Cobourg at 13% is slightly lower than provincial and national rates of 17% and 16%, respectively.

Figure 14: Cultural Industry Employment, Cobourg, 2016



Source: EMSI Analyst, 2018

Figure 16 shows employment in the cultural industry in 2016. The top employing sector was *accommodation and food services*, accounting for 44% (770 employees). Specifically, the 770 employees were employed in *full-service restaurants and limited-service eating places*. The other top employing industry groups were *retail trade* and *professional, scientific and technical services*, accounting for 15% (260 employees) and 13% (236 employees).

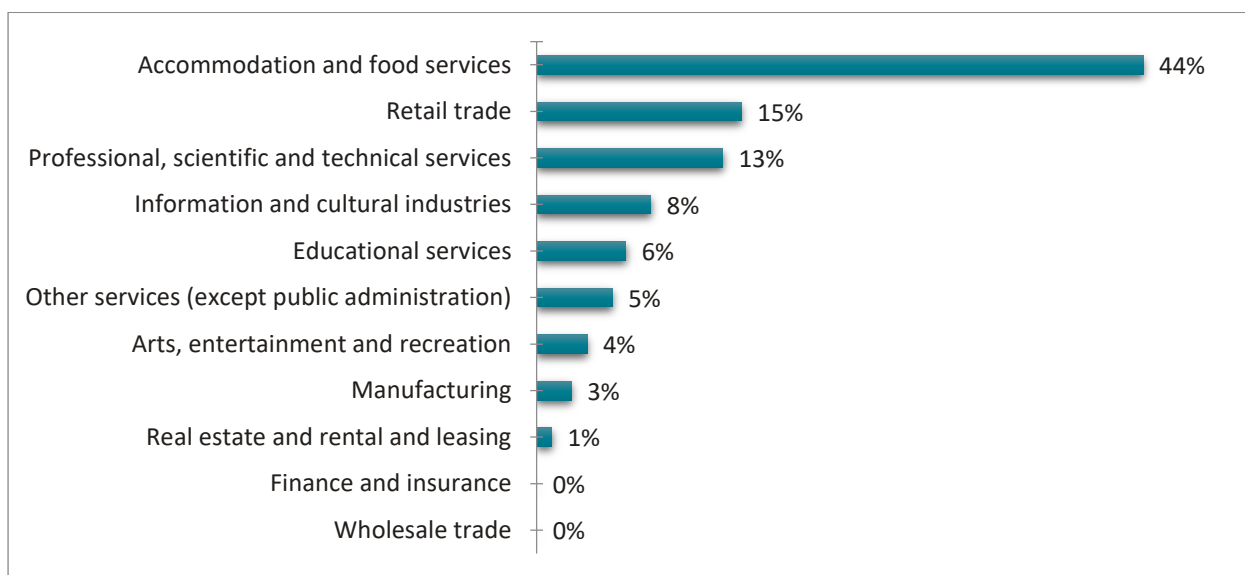
Under *retail trade*, the majority were employed as *other miscellaneous store retailers*¹ – 7% (124 employees). Under *professional, scientific and technical services*, the majority performed *specialized design services* – 6.8% (119 employees).

Information and cultural industries represented 8% (145 employees) in 2016. The majority of these employees were in the *Motion picture and video industries* – 6.2% (110 employees). *Arts, entertainment and recreation*, accounted for 4% (64 employees).

¹ This Canadian industry comprises establishments, not classified to any other Canadian industry, primarily engaged in retailing specialized lines of merchandise. Examples include: artists' supplies and auctioneering.



Figure 15: Cultural Employment by Industry, Cobourg, 2016



Source: EMSI Analyst, 2018.

Employment in the cultural industry is growing in Cobourg (Figure 16). From 2006 to 2016, the sector saw an additional 197 employees, equating to a growth of 13%. Cultural employment growth in Cobourg follows provincial (24%) and national rates (21%), albeit at a slower rate.

Educational services, retail trade, arts, entertainment and recreation and information and cultural industries were all growth sectors in Cobourg.

Figure 16: Cultural Industry Labour Force, Cobourg, 2006 -2016

Cultural Industry (NAICS)	Employment		Employment Change 2006-2016	
	2006	2016	Absolute Change	Percentage Change
Manufacturing	55	44	-11	-20%
Wholesale trade	0	0	0	-
Retail trade	185	260	75	41%
Information and cultural industries	125	145	20	16%
Finance and insurance	0	0	0	
Real estate and rental and leasing	14	19	5	36%
Professional, scientific and technical services	234	236	2	0.9%
Educational services	29	113	84	290%
Arts, entertainment and recreation	31	64	33	107%
Accommodation and food services	850	770	-80	-9.4%
Other services (except public administration)	11	96	85	772%
Total	1,557	1,754	197	13%

Source: EMSI Analyst, 2018.



Figure 16Figure 17 shows the labour force of the cultural industry for Cobourg and select peer communities. In 2016, the cultural industry in Cobourg accounted for 13% of the total labour force. That percentage is mirrored in Port Colborne but surpassed by Niagara-on-the-Lake and Prince Edward County at 22% and 18%, respectively. Employment growth in the Cultural Industry in Cobourg of 13% from 2006 to 2016 is comparable to growth in Port Colborne. Prince Edward County saw its cultural industry employment levels increase by 35% (410 employees) over the same time period.

Figure 17: Cultural Industry Labour Force by Region, 2006 -2016

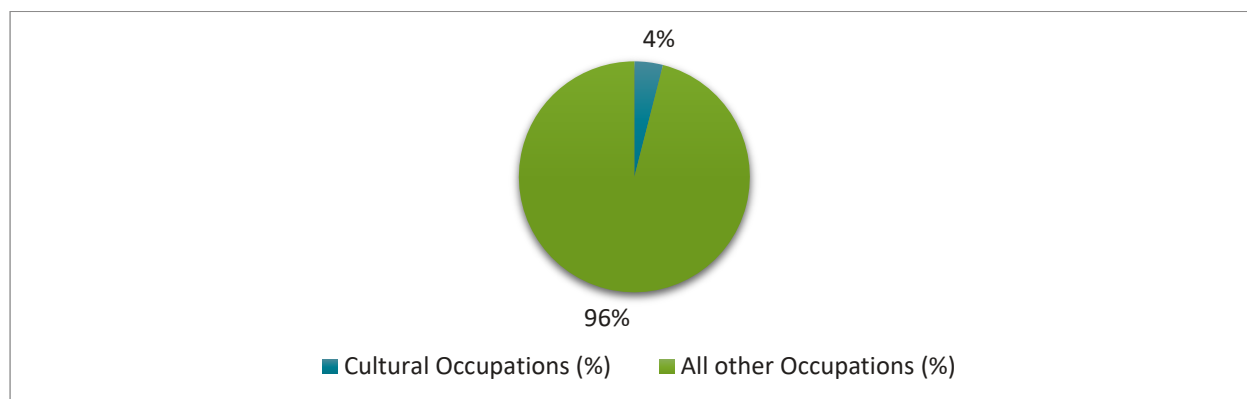
Region	Cultural Industry Employment (NAICS)		Cultural Industry Employment as a factor of Total Employment (%)		Job Change 2006-2016		LQ 2016
	2006	2016	2006	2016	Absolute Change	% Change	
Cobourg	1,557	1,754	13%	13%	197	13%	0.85
Prince Edward County	1,184	1,594	14%	18%	410	35%	1.20
Belleville	4,202	4,474	11%	11%	272	6%	0.76
Port Hope	901	1,152	11%	14%	251	28%	0.95
Port Colborne	764	890	11%	13%	126	16%	0.89
Niagara-on-the-Lake	2829	3531	22%	22%	702	25%	1.52

Source: EMSI Analyst, 2018.

Cultural Occupations

In 2016, approximately 557 occupations in Cobourg were cultural occupations. As indicated in Figure 18, cultural occupations accounted for 4% of total occupations.

Figure 18: Cultural Industry Employment, Cobourg, 2016

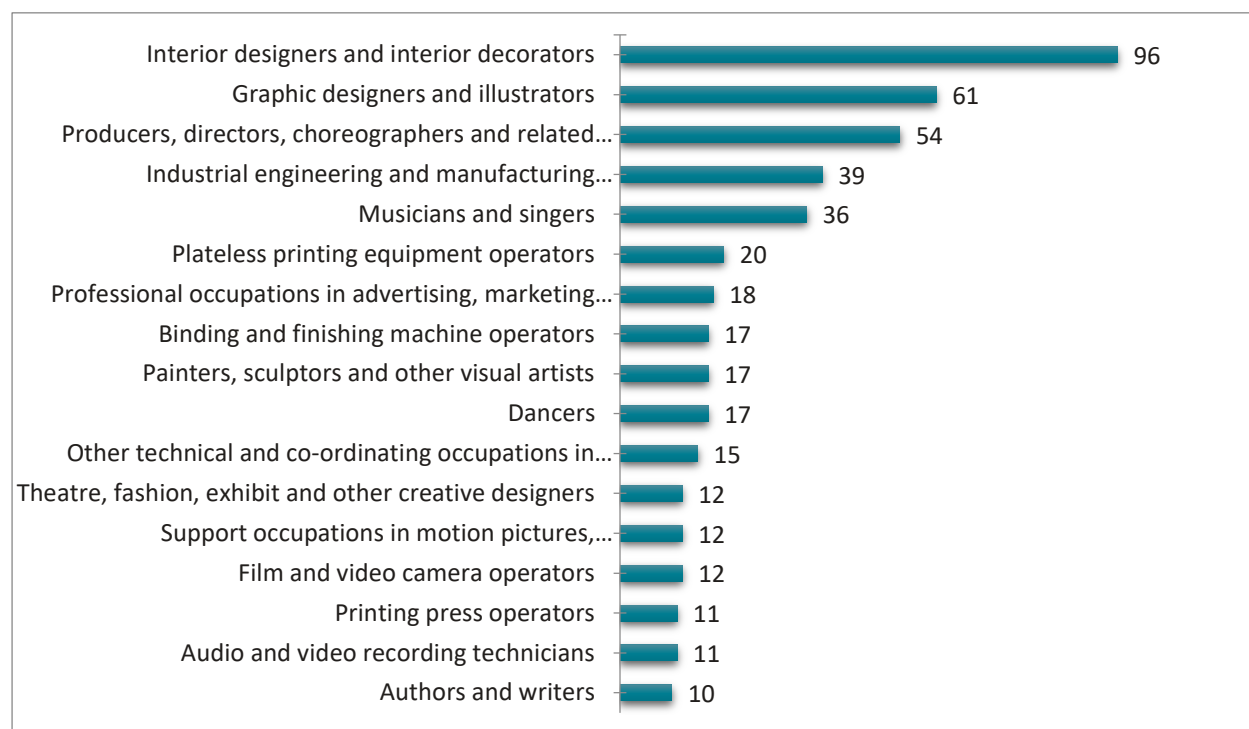


Source: EMSI Analyst, 2018.



As illustrated in Figure 19 shows the top cultural occupations in Cobourg. The top cultural occupations in 2016 were *interior designers and interior decorators*, *graphic designers and illustrators* and *producers, directors, choreographers and related occupations*.

Figure 19: Top Cultural Occupations, Cobourg, 2016



Source: EMSI Analyst, 2018.

Cultural occupations in Cobourg grew by 46% (175 occupations) from 2006 to 2016. Occupations related to art, culture, recreation and sport accounted for the largest growth from 2006 to 2016, approximately 303 occupations.

Figure 20: Cultural Occupations and Occupations Change in Cobourg, 2006 & 2016

Cultural Occupations (NOC)	Year		Occupation Change 2006-2016	
	2006	2016	Absolute Change	% Change
Management occupations	<10	<10	0	-
Business, finance and administration occupations	57	18	-39	-68%
Natural and applied sciences and related occupations	80	39	-41	-51%
Occupations in art, culture, recreation and sport	50	353	303	606%
Equipment operators and related occupations	38	11	-27	-71%
Occupations in manufacturing and utilities	53	37	-16	-30%
Total	382	557	175	46%

Source: EMSI Analyst, 2018



Figure 21 shows the cultural occupations growth for Cobourg and the peer communities. In 2016, cultural occupations in Cobourg accounted for 4% of all occupations. The proportion of cultural occupations in Cobourg is in the middle of the comparator communities; with cultural occupations in Prince Edward County and Port Hope as high as 5% of all occupations, and Port Colborne's cultural occupations at 2%. From 2006 to 2016, cultural occupations in Cobourg grew by 46% (175 occupations). Cultural occupation growth in Cobourg is comparable to growth in Port Hope and Belleville and is higher than the growth seen in Prince Edward County, for the same time period.

Figure 21: Total Number of Cultural Occupations by Region, 2006-2016

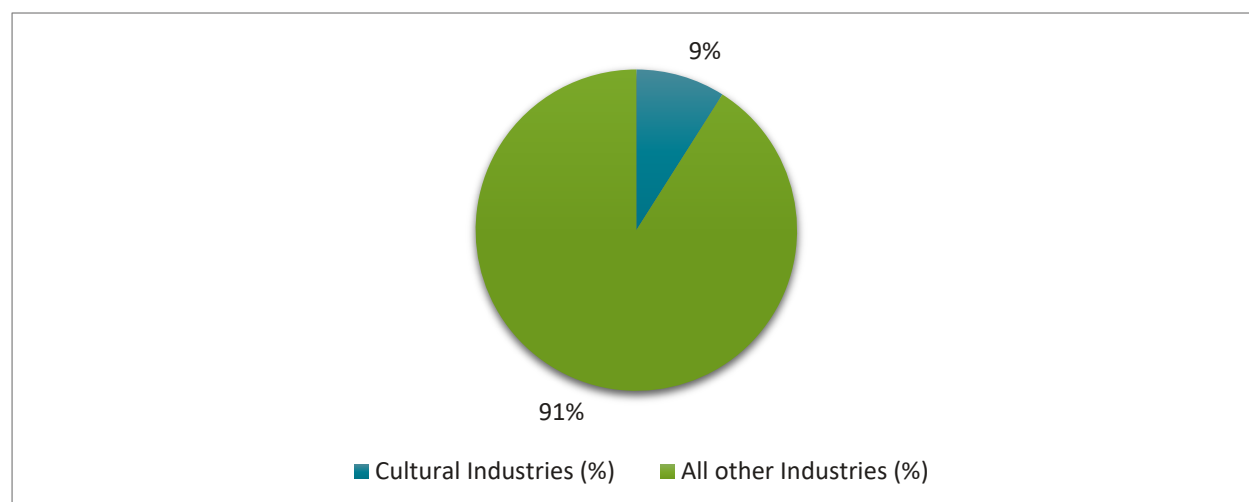
Region	Total Cultural Occupations (NOC)		% of Cultural Occupations as a factor of Total Occupations		Cultural Occupation Change 2006-2016	
	2006	2016	2006	2016	Absolute Change	% Change
Cobourg	382	557	3%	4%	175	46%
Prince Edward County	336	421	4%	5%	85	25%
Belleville	976	1,103	3%	3%	127	13%
Port Hope	249	410	3%	5%	161	65%
Port Colborne	158	130	2%	2%	-28	-18%
Niagara-on-the-Lake	753	583	6%	4%	-170	-23%

Source: EMSI Analyst, 2018

Cultural Industries

Error! Reference source not found. shows cultural industries in Cobourg. In 2017, cultural industries in Cobourg accounted for 9% (179 industries) of total industries. The proportion of cultural industries in Cobourg is similar to provincial and national rates at 10% and 9%, respectively.

Figure 22: Cultural Industries, Cobourg, 2017

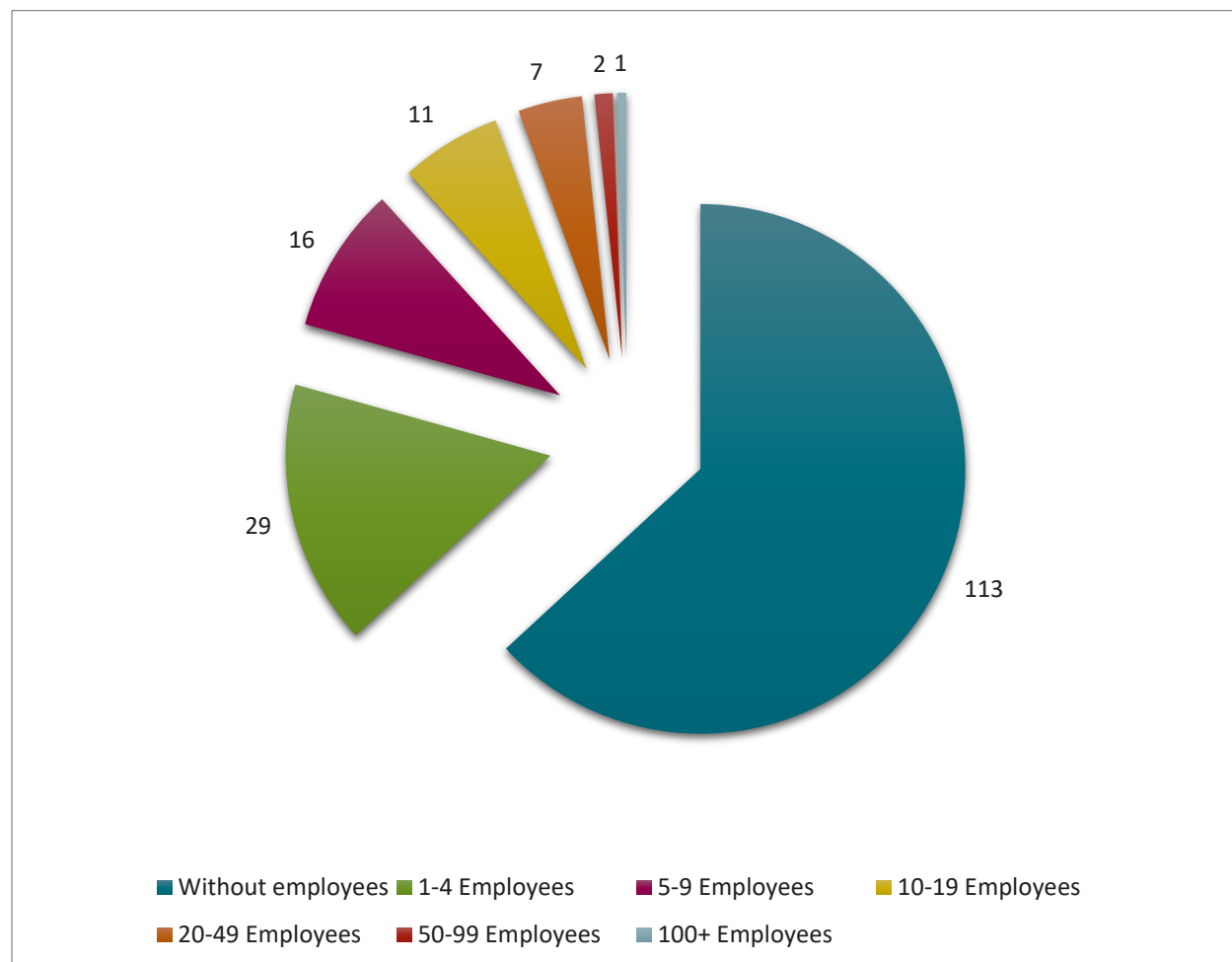


Source: Canadian Business Counts, 2014-2017



Figure 23 shows the breakdown of cultural industries by employee number. 113 cultural industries were sole-proprietorships while 29 employed from 1 to 4 employees. One cultural industry employed more than 100 employees; this was determined to be *fitness and recreational sports centre* as per the industry NAICS.

Figure 23: Cultural Industries by Employee Number, Cobourg, 2017



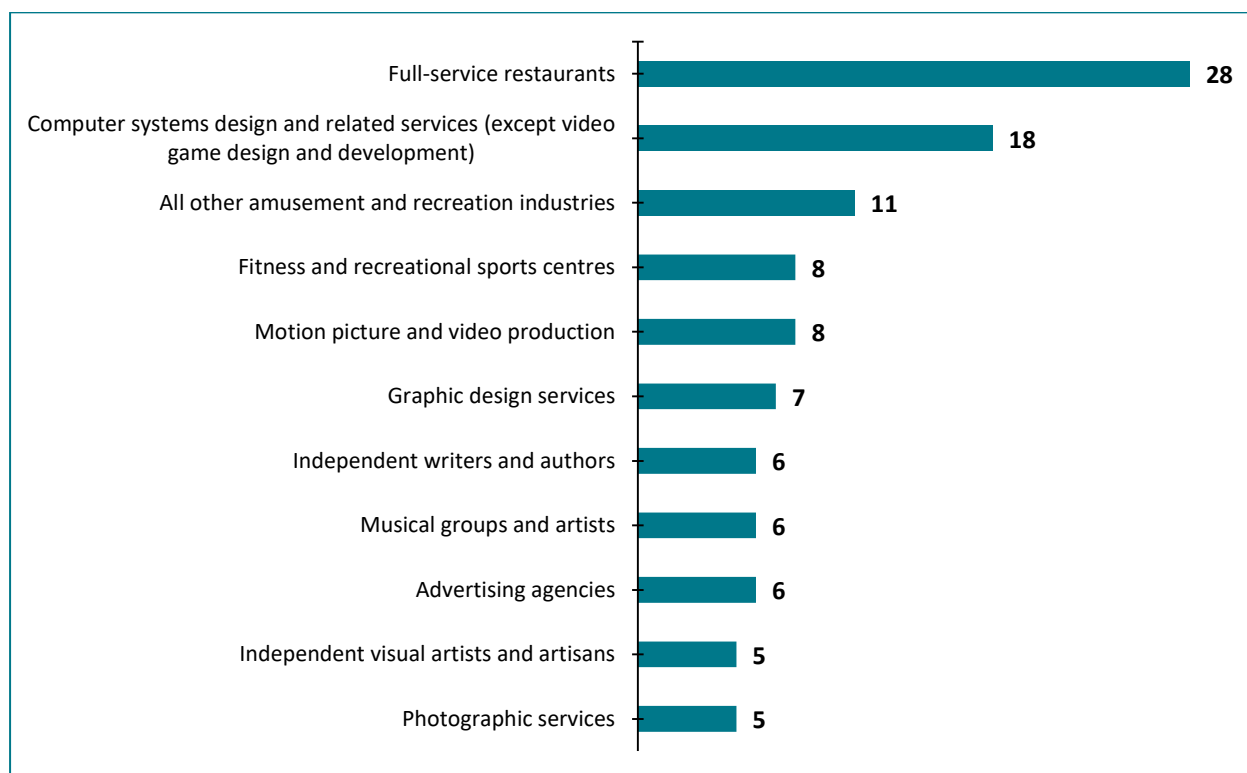
Source: Canadian Business Counts, 2017

Figure 24 shows the top cultural industries in Cobourg in 2017 by counts. The top cultural industry was *full-service restaurants*, representing 16% (28 cultural industries) of all cultural industries in Cobourg. The other top cultural industries include *computer systems design and related services (except video game design and development)* and *all other amusement and recreation industries*².

² This industry comprises establishments (except amusement parks and arcades; gambling industries; golf courses and country clubs; skiing facilities; marinas; fitness and recreational sports centers; and bowling centers) primarily engaged in providing recreational and amusement services.



Figure 24: Top Cultural Industries, Cobourg, 2017



Source: Canadian Business Counts, 2017

Analyzing the percentage of cultural industries in Cobourg to peer communities, it was determined that Cobourg ranks higher than Port Colborne and Belleville and is comparable to cultural industries in Niagara-on-the-Lake, Prince Edward County and Port Hope (Figure 25).

Figure 25: Total Number of Cultural Industries in Comparative Communities, 2017

Region	Cultural Industries (NAICS)	% of Cultural Industries as a factor of Total Industries
Cobourg	179	9.0%
Prince Edward County	265	9.6%
Belleville	256	6.9%
Port Hope	134	9.9%
Port Colborne	73	6.3%
Niagara-on-the-Lake	266	9.0%

Source: Canadian Business Counts, 2017



Value Chain of Cultural Industries

The cultural industries in Cobourg were also studied in terms of the value chain. Cultural industries, although part of the larger economy, are those businesses with a primary focus of creating, producing, distributing cultural goods and services and trade in intellectual property rights which secure the economic value of these goods. This is often referred to as the value chain and can be further defined by function as:

- **Creation** – businesses involved in the development of a cultural, artistic idea, e.g., independent artists, writers and performers
- **Production** – businesses involved primarily in producing a cultural good or service, e.g., books or magazines, concerts, theatre performances, or exhibitions
- **Manufacturing** – businesses involved in the mass reproduction of culture core goods, e.g., film duplication, printing, visual arts posters from a master copy
- **Distribution** – businesses that distribute core culture goods to wholesalers and retailers, radio and television broadcasters, or the internet
- **Support Activities** – businesses that help to finance or support creation and production, e.g., copyright collectives, agents, managers, promoters

Reflecting on the value chain, it is understood that cultural industries are a series of interconnected businesses or 'clusters' that are connected to each other both within the cultural industries and in the rest of the economy. Thus, there is no 'ideal' distribution of activities across the cultural value chain. The cultural value chain should be instead studied to determine the ability of a community to create creative value and provide cultural good or service to consumers. Analysing the cultural value chain of Cobourg both in terms of (a): Location Quotient and (b): the distribution of businesses with respect to Ontario and peer communities helps benchmark each function and focus on those functions that can increase products and services and enhance customer value. The cultural value chain analysis is described below:

Figure 26 shows the cultural industries in Cobourg in 2014 and 2017 and the change in industries from 2014 to 2017 as per the cultural value chain.

- Cobourg has 56 cultural industries involved in the creation of cultural goods and services in 2017. The majority of these were *computer systems design and related services (except video game design and development)*, followed by *graphic design services, musical groups and artists* and *independent writers and authors*. From 2014 to 2017, cultural industries involved in creation grew by one (1) establishment. The location quotient analysis shows that creation industries with an LQ of 0.64 are in low concentration in Cobourg compared to the province.
- Nineteen (19) cultural industries were involved in the production of cultural goods and services in 2017. The majority of these were enterprises in *motion picture and video production, radio broadcasting, breweries* and *festivals*. Production cultural industries grew by four establishments from 2014 to 2017. The concentrations of production industries with an LQ of 1.18 in Cobourg are on par with production industries in the province.
- Twenty-one (21) cultural industries were involved in the manufacturing of cultural goods and services in 2017. The majority of these were *advertising agencies*. Manufacturing cultural industries



grew by four establishments from 2014 to 2017. The concentrations of manufacturing industries with an LQ of 1.58 in Cobourg are highly concentrated compared to the province.

- Sixty-six (66) cultural industries were involved in the distribution of cultural goods and services in 2017. The majority of these were *full-service restaurants, all other amusement and recreation industries* and *fitness and recreational sports centres*. Distribution cultural industries grew by six establishments from 2014 to 2017. The concentrations of distribution industries with an LQ of 1.38 in Cobourg are highly concentrated compared to the province.
- Seventeen (17) cultural industries were involved in support of creation and production. These included services related to *advertising, publishing, printing and funds and financial vehicles*. Support cultural industries grew by 4 establishments from 2014 to 2017. The concentrations of support industries with an LQ of 1.20 in Cobourg are on par with support industries in the province.

Figure 26: Cultural Value Chain, Cobourg 2014 & 2017

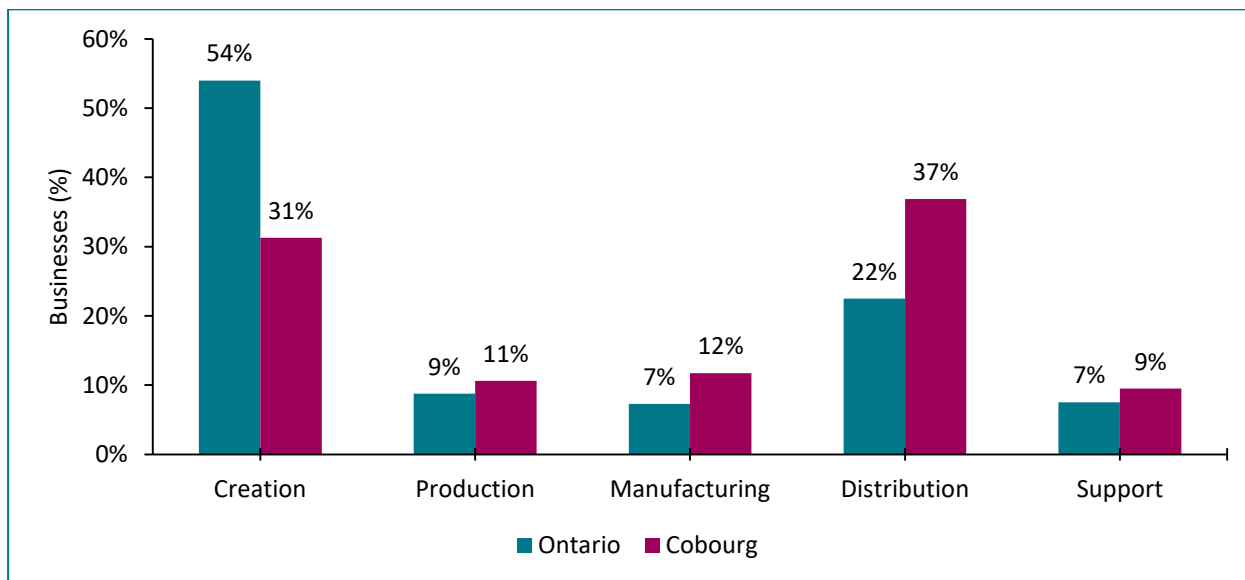
Cultural Value Chain	Cobourg (Year)		% of Value Chain as a factor of total Cultural Industries, 2017	2014 -2017 Cultural Industries Change		LQ 2016
	2014	2017		Absolute Change	% Change	
Creation	55	56	31%	1	2%	0.64
Production	15	19	11%	4	27%	1.18
Manufacturing	17	21	12%	4	24%	1.58
Distribution	60	66	37%	6	10%	1.38
Support	13	17	9%	4	31%	1.20
Total Cultural Industries	160	179	100%	19	12%	0.88

Source: Canadian Business Counts, 2017

If the cultural value chain of Ontario is taken as a point of reference (Figure 27), it can be understood that Cobourg has a lower proportion of creation industries at 31% compared to the province with 54%. Cobourg has a higher proportion of distribution industries than the province. The proportion of industries in production, manufacturing and support services in Cobourg is comparable to the province. Comparing Figure 27 and the Location Quotient analysis provided in Figure 26, it is understood that Cobourg has a good proportion of support functions, namely, production, manufacturing, distribution and support. Thus, Cobourg is favourable to cultural sector growth and uptake and serves as a favourable location for artistic talent and creativity growth. Cobourg can focus on enhancing the creation industries to ensure a wide range of cultural products and services are created.



Figure 27: Cultural Value Chain, Cobourg compared to Ontario, 2017

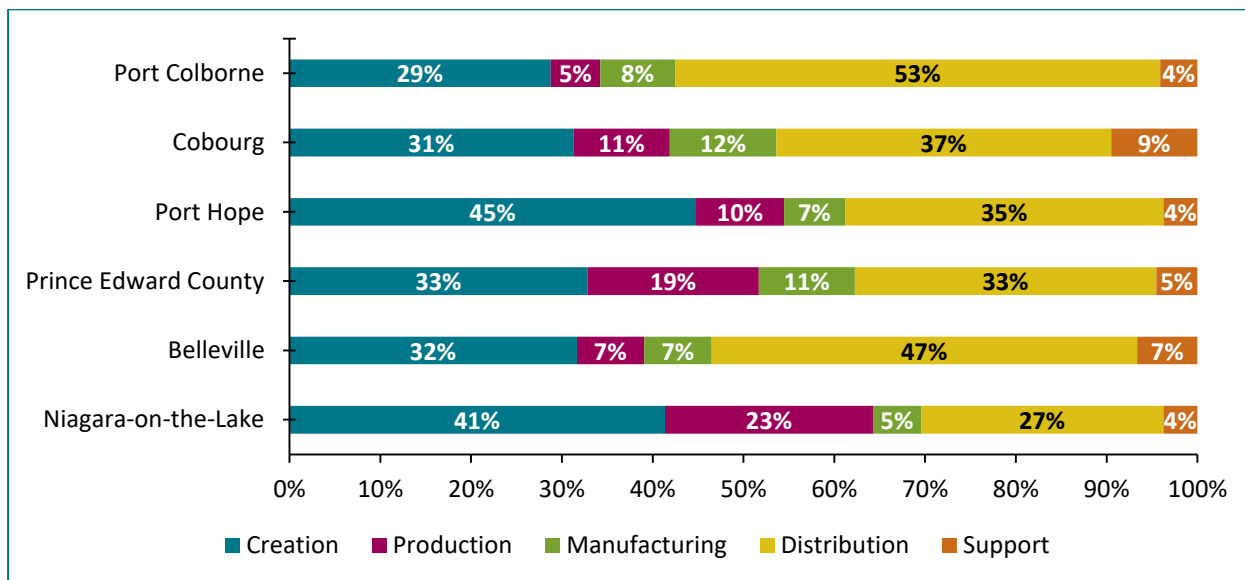


Source: Canadian Business Counts, 2017

The cultural value chain in Cobourg was also compared to select peer communities (Figure 28). Cobourg has a similar proportion of creation industries as Prince Edward County, Belleville and Port Colborne. Cobourg had 37% of cultural industries in cultural distribution industries compared to Port Hope (35%), and Prince Edward County (33%). Cobourg's support industries for the cultural sector sit at 9% of cultural industries, which is higher than Port Hope and Port Colborne at 4%.



Figure 28: Cultural Value Chain, Cobourg compared to Peer Communities, 2017



Source: Canadian Business Counts, 2017



Section Four

Emerging Trends in Arts and Culture Development Delivery in Municipalities



Section Four

Emerging Trends in Arts and Culture Development Delivery in Municipalities

Communities of today are becoming vibrant spaces for experimentation, a process in which culture and economic development have come to occupy a central place. The rise of “creative communities” around the world attests to their growing role in driving economic activity. Creative communities are emerging as epicenters for effective policymaking as they are often able to act quickly and offer responses that integrate culture, planning, community services and economic development.

This compilation of research intends to serve as input to future discussions regarding Cobourg’s current delivery of arts and culture development within the municipality. The emerging trends research is intended to be an inspiration for networking and collaboration between culture, planning and economic development professionals.

Cultural Policymaking in the City

For most cities and regions, transformative economic change cannot happen without culture. Over the past 10 to 15 years, culture has been recognised as a key element in strategies for local development. It has been widely acknowledged that the presence of dynamic cultural activities is a major factor of attractiveness. Cultural heritage is a key element of image and identity and the main focus of city tourism. The rapid development of cultural and creative industries is a substantial economic driver. Initiatives such as the global *Agenda 21 for Culture*³ advocate strongly for the role of culture in sustainable economic development. As globalization’s economic, social, political, environmental, and cultural effects have become more visible at a local and national level, access to and participation of citizens in arts and culture enhances intercultural dialogue, supports social cohesion, leads to social innovation, and fosters an inclusive society.

For Cobourg, adding culture as part of economic development’s core service areas could provide for strategic “tools” to support economic investment by broadening the capacities and opportunities of cultural entrepreneurs. Cultural entrepreneurs often accelerate and enable citizen participation and community empowerment, all while generating grass-roots processes that animate public spaces, and celebrate the past, the present and the future.

There are many examples of good practices across the globe that recognise the importance of access to culture through individual and collective innovation, participatory projects, heritage projects, cultural tourism, and the creative industries. While large (in terms of scale) the Cities of Barcelona and Lille provide parallels in how embedding cultural tools into economic tools can support the creation and empowerment of creative entrepreneurs and residents in building an innovative cultural community.

³ <http://www.agenda21culture.net/>



Barcelona, Spain

The city of Barcelona, with its 1.6 million inhabitants, believes it is important to its economic success to encourage access to culture through the artistic and creative community by putting resources to promote cultural production within their reach. This is achieved, for instance, through the existence of Art Factories¹ in different neighbourhoods of the city. The citizens themselves are encouraged to become protagonists in cultural projects and through price policies, new multimedia art forms, and participatory projects. The great added value has been to generate new ideas and, above all, intangible assets such as social cohesion in the neighbourhoods and the increase of citizen participation in cultural life, which in turn empowers the city economically in attracting professionals (and their firms) who desire these connections.



GARE DE LILLE FLANDRES, LILLE, FRANCE via Flickr user JULIAN MASON (CC BY 2.0)

Lille, France

The city of Lille, with a population of approximately 230,000 inhabitants, lies in Northern France and is part of a large urban community of approximately 1.1 million. Today's cultural policies in Lille combine the improvement of city-centre and neighbourhood cultural facilities, support for artistic creativity, broadening opportunities for access to culture for all, and the enhancement of cross-border and international connectivity. General objectives include the provision of access to culture to disadvantaged and diverse groups, the attraction and retention of creative talents, support for collaboration among different stakeholders, and the integration of culture in local and regional economic development strategies. Lille embraced culture as the "fourth pillar" of sustainable development, placing culture as a development strategy alongside economic, social and environmental practices. Research data show this has had a number of effects, including a better image for Lille in the eyes of both residents and outsiders and increased figures in economic growth.



Cultural Institutions and the Creative Community

Much has been written about the changing role of cultural institutions. Communities that promote the creative industries are often more successful from both economic and social inclusion perspectives. Traditional cultural institutions are regarded as agents, or triggers, of urban change and innovation – a means of attracting and connecting creative city dwellers. This realization has led to communities embedding cultural institutions into their structures in order to create sustainable and efficient plans that will allow them to compete on domestic and global levels.

The term “cultural institution” has a wide application. It can refer to museums, galleries, libraries, and theatres – what may be called “the traditional arts” – but, it can also refer to many forms of public spaces where cultural activities take place.

Throughout the world cultural institutions have been actively looking for ways to be more accessible and inclusive. There has been a shift in balance from focussing primarily on their core business (the collection, the exhibition, or the next performance) to embracing their audience’s needs and allowing them to determine priorities to a greater extent.

By introducing community development objectives into these cultural institutions, they are well positioned to becoming welcoming centres with a wider and more engaging social and economic role. They can provide the opportunity for a shared creative experience between businesses, residents and visitors. It is through this engagement that the combination of culture and community development has the potential to connect and inspire.

Looking at the community of Łódź in Poland, the idea of using cultural institutions as focal points for creativity has helped the City implement its creative city model. The decision to use cultural institutions as focal points came about when cultural institutions were struggling to promote themselves through a traditional lens and saw the momentum behind creative industries as an opportunity to become hosts of creativity (which is similar to the context Cobourg is faced with).



Łódź via Flickr user [Elroy Serrao](#) (CC BY-SA 2.0)

Łódź, Poland

With a population of approximately 720,000 inhabitants, Łódź lies in the centre of Poland and is the third largest city in the country. The surrounding Lodzkie Region comprises a total population of 2.6 million. The area has undergone major restructuring in recent decades, mainly as a result of economic and demographic decline, which have forced this former stronghold of the textile industry to reinvent itself. In recent years, both municipal and provincial authorities have undertaken major investments in new large-scale cultural infrastructure, which take advantage of old industrial buildings and leverage culture as an asset for local development.¹

Culture is deeply integrated in the regional vision, as proven by the Culture Development Programme and the Regional Innovation Strategy for the Lodzkie Region, which identifies culture as a key sector. In Łódź's 2010 marketing strategy, the city was defined as Poland's centre for the creative industries. In 2011, the City of Łódź received a loan for the partial financing of the New Centre of Łódź, one of the biggest urban renewal projects in the history of the city. The investment was aimed, among other goals, at refurbishing heritage buildings and promoting cultural infrastructure through the extension of the municipal theatre and the adaptive re-use of a former central heating unit into a new cultural complex. The latter, known as EC1, includes an interactive science centre and a film studio, among other facilities. Recent data¹ shows that these initiatives have contributed to an increase in tourism to the number of social and cultural events in the city as well as the development of new civil society initiatives.

The range of initiatives implemented in the Łódź region attest to the strong belief of public authorities in the power of cultural infrastructure and cultural activities to effect social and economic transformation, which early results are confirming.¹ This is reflected in a range of local and regional strategies, which have enabled Łódź to take advantage of several funding sources and ensure alignment between different interventions. In addition to investment in infrastructure, it is worth noting that other schemes are in place to strengthen the cultural fabric by providing support and advice to creative entrepreneurs.



Building Local Creative Talent and Awareness

Cities often do not know the individuals that make up their creative community and are unaware of their development journey or even international achievements in their various subgenres of the creative industries – not until the point of winning a major national or international award.

This general lack of awareness is usually echoed in a lack of appropriate support. Both can, however, be relatively easily redressed through a combination of marketing and advisory services, which typically leverage provincial and national support programs. Areas include:

- **Marketing** – Creative communities promote their events, and their achievements through e-bulletins, websites and press releases. Through promotion, such cities are able to use their local talent's creative activity to reflect a genuine creative ethos and authenticity in the image of their community.
- **Business start-up advisory services** – Communities provide this across all industries and provide general business seminars in leadership, marketing, accounting systems and business law. However, creative industry practitioners often do not rate these services highly, as they may find these services lack knowledge of their industries, their range of business models, IP issues, and markets. Creatives may turn to the local Arts Council, even though officers have limited knowledge of business development, because at least they generally feel better understood (In Scotland, the enterprise agency established the Cultural Enterprise Office to bridge this gap. It provides customized business start-up advice and mentoring for creative and cultural practitioners to address these issues).
- **Network building** – Creative communities bring together creative individuals by hosting their workspaces or meeting spaces, and supporting their co-trading, skills sharing and peer mentoring. Building this network is invaluable to creative practitioners as it reduces isolation, allows the sharing of skills and equipment, and often catalyzes ideas leading to business development and innovation. It also provides the opportunity for city staff to meet and get to know their creative community and a forum to discuss how they may work together to develop the industry and build their talents.

All of this contributes to talent retention and can enhance Cobourg's attractiveness to cultural businesses and organizations seeking to locate where there is a local hotbed of talent and where external talent can be attracted.

A great example of building creative talent can be found through the Cultural Enterprise Offices that are spread across Scotland.



Cultural Enterprise Office, Scotland

The Cultural Enterprise Office (CEO) is Scotland's specialist business support and development service for creative and cultural businesses and individuals. Its range of business support services help creative micro-businesses based in Scotland build the skills and knowledge they need to clarify their creative ideas and turn them into flourishing enterprises. The CEO supports 3,018 micro businesses and cultural practitioners a year. The CEO, while a national programme, works directly with local economic development and arts, culture and leisure service departments. Specifically, the CEO connects the businesses with the local programs and activities.