ANALYSIS of the

DOWNTOWN COBOURG VITALIZATION

RESIDENTS SURVEY

Prepared by the Economic Development Working Group

May 2013

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Acknowledgements

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Executive Summary

This report describes the results of a Residents Survey that was conducted as part of the Downtown Cobourg Vitalization project. The aim of the survey was to collect information about issues pertaining to: 1) residents' use and opinions of Downtown businesses; 2) the appearance of Downtown; 3) the activities that residents enjoy Downtown; and 4) additional services or facilities that may be needed Downtown.

The Residents Survey, consisting of 33 questions, was created using I:Survey and deployed on-line in January/February of 2013. Approximately 1000 residents in Cobourg and the surrounding areas of Northumberland County completed it. This response rate is considered very good, although the sample itself somewhat over-represents the views of older residents who live in the Town of Cobourg and under-represents teens. It is slightly biased towards the views of women and may also be biased towards more affluent respondents.

Survey respondents say that they visit the Downtown often, drawn by Downtown events and festivals, and the outstanding outdoor features of Cobourg (e.g., the waterfront). Respondents come Downtown mainly for recreation, restaurants and entertainment, financial services and – less frequently – to shop.

Overwhelmingly, respondents say that they patronize the Downtown to support the local businesses and because the Downtown services are close to home. However, they believe that businesses outside Cobourg provide a better variety of products and services, as well as better selection, price and hours – issues noted as needing improvement in the Cobourg Downtown. Limited – and inconsistent – business opening hours were a particular frustration for respondents.

While a variety of suggestions were offered concerning additional stores or services needed Downtown, the need for food-related shops, such a green grocer, butcher and specialty food stores – as well as affordable restaurants – was consistently highlighted. For example, a waterfront restaurant and a year-round Farmers' Market were both considered highly desirable by residents.

Residents are very concerned about the vacant business premises in the Downtown. The many empty storefronts, coupled with the poor upkeep of many buildings and the several discount-type stores, create – according to respondents' comments – a tired and rundown feeling in the Downtown. The poor appearance of back lanes and parking lots is an added concern. Many respondents expressed the opinion that the building owners are not being held accountable for maintaining their properties. For example, timely snow and ice removal from sidewalks in the winter was noted as a concern. While residents are generally satisfied with the flowers, planters and landscaping done by the Town, they feel improvement is needed in recycling facilities, and litter/garbage collection, especially on the beach after summer weekends. Finally, respondents demanded significant improvement in the availability of public washrooms.

The issue of the parking facilities in the Downtown provoked a mixed reaction – both positive and negative – from respondents.

There were many suggestions made for facilities geared to special groups: youth, families and seniors. High on the list for each group was a centre ("drop-in" centre) with activities tailored to the needs and interest of that group. Additional suggestions for youth focused on sports, music and – importantly – counseling services. For families, the suggestions were more diverse: e.g., family-focused restaurant, pool, beach facilities. For seniors, the emphasis, in addition to a drop-in centre, was on medical and transportation services and improving accessibility (e.g., snow removal).

Notwithstanding the concerns about Downtown that were expressed by respondents, their final comments can be summed up as follows: "Cobourg is a beautiful town in a spectacular location and with great potential". Respondents felt that this Vitalization survey was long overdue and they appreciated the opportunity to have input. They look forward to the actions that will address their concerns.

Introduction

This report describes the results of a Residents Survey that was conducted as part of the Downtown Cobourg Vitalization project. The aim of the survey was to collect information about issues pertaining to: 1) residents' use and opinions of Downtown[1] businesses; 2) the appearance of Downtown; 3) the activities that residents enjoy Downtown; and 4) additional services or facilities that may be needed Downtown.

The survey was designed using I:Survey (Version 4.069.003)[2], a tool made available to Vitalization through the Economic Development and Tourism Office of Northumberland County. The tool allows the creation of an on-line survey with questions in various formats (e.g., yes/no answers, scales, open text) and the collection of responses. The tool also compiles frequency counts and percentages from the responses and permits the export of data to a spreadsheet for further analysis of open text responses.

An early version of the Residents Survey for the Downtown Cobourg Vitalization was based on a similar residents' survey done in Goderich, Ontario[3]. Members of the Economic Development Working Group tailored that initial draft to the needs of the Cobourg Vitalization project. Later drafts were reviewed by the Task Force and by Cobourg Council and modifications were made until a final version was achieved. That version was then pilot tested at the Cobourg YMCA to ensure the questions were clear and the survey could be completed in 20 minutes, the target length. The final Residents Survey (see Appendix A) comprised 33 questions.

The survey was deployed using a website (Cobourg-Talk-of-the-Town.ca) and was open for responses between 14 January and 24 February 2013.

The survey was advertised in the local newspapers, on radio and on two mobile signs located on routes into Cobourg. Access was available to anyone – not just Cobourg residents. A paper version of the survey was included in the Northumberland News on two separate occasions, both to advertise the survey and to provide an alternate method of response for those without computer access. Extra copies of the paper version were provided in the Cobourg Public Library.

A total of 1307 respondents[4] started the survey (i.e., answered the first question). Some respondents got part of the way through and cancelled out, although their answers up to

[1] In this report, the term "Downtown" means specifically the Cobourg Downtown Vitalization

[2] Copyright 2012 eSolutionsGroup

[3] Downtown Revitalization Coordinator's Manual, Goderich BIA Residential Survey 2008, Resource II-19. (2010). OMAFRA.

[4] This total includes 105 paper versions of the survey that were manually entered into the dataset.

the point of cancellation were recorded. The response totals dropped to just over 1000 responses per question by Question 14 and then stayed around that level for subsequent questions, except the last. (Not all questions had the same response total.) The last question, asking for the respondent's postal code, had a response total of 861.

Many of the questions in the survey involved selecting an answer out of a set of predefined responses (e.g., Question 19, "Do you think the Town of Cobourg should charge for parking in the Downtown? Yes/No"). The results from these questions were compiled by the I:Survey tool as response totals and percentages for each answer.

The remaining questions in the survey were open-ended, allowing respondents to type a text response (e.g., Question 2, "What is your favourite place Downtown?"). For these questions, the data were exported to a spreadsheet and a coding system was developed to categorize the responses, which was done by hand in the spreadsheet.

The statistical validity of the results of the Residents Survey was calculated using www.surveysystem.com/sscalc.htm, as recommended by OMAFRA in the *Downtown Revitalization Coordinator's Manual.* For this survey, which had a response of more than 1000 residents from the Cobourg Trade Area (population 43,348), the survey results are 95% significant within a confidence interval of +/- 3.1%.

The results in the remainder of this report are presented graphically in terms of percentages of total respondents, unless otherwise stated.

Demographics

This section presents a snapshot of survey respondents, using demographic data collected in several questions and compares these demographics – gender, age, household size and income – to those of both Cobourg residents and the residents of the Cobourg Trade Area. Data for Cobourg are taken from the 2011 Cobourg Community Profile[5]. Data for the Cobourg Trade Area were compiled by the Ontario Ministry of Agriculture, Food & Rural Affairs (OMAFRA) and made available in a Market Analysis report based on the Customer Origin Survey conducted in Cobourg in November, 2012[6]. A comparison between the respondents to the Residents Survey and the residents of Cobourg and its Trade Area is important for determining whether the information from the survey is representative of the areas that the Downtown serves or wishes to serve.

[5] Cobourg Community Profile (2011). Business & Tourism Centre, Town of Cobourg.
[6] Town of Cobourg Market Analysis Report (2013). OMAFRA.

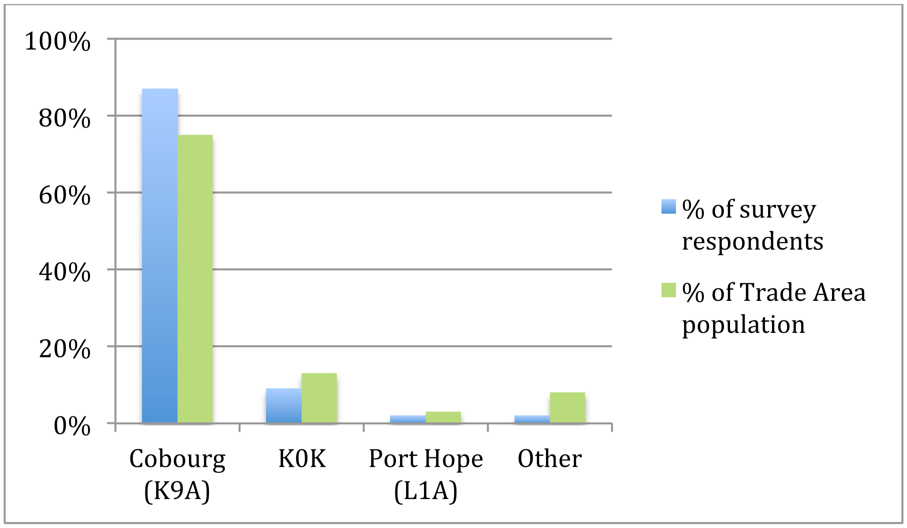

Figure 1- Respondents' postal codes for Residents Survey and Trade Area

The postal code information collected in the Residents Survey (Question 33) gives an indication of where respondents live (blue bars in Figure 1). It is clear from Figure 1 that the majority (87%) reside in Cobourg itself (i.e., postal code K9A). Nine percent (9%) of respondents live in the surrounding parts of Northumberland County (e.g., Grafton, Baltimore, Colborne), in the K0K postal region. Another 2% live in Port Hope.

The distribution of population based on postal codes in Cobourg's Trade Area (green bars in Figure 1) shows that a lower proportion of people in the trade area live in Cobourg (75%) and a higher proportion live either in the surrounding parts of Northumberland County (e.g., 13% live in postal code K0K) or in other regions (8%). A comparison between the distributions suggests that the Residents Survey under-represents the views of residents who live outside Cobourg, but who use the town as a centre for shopping and services.

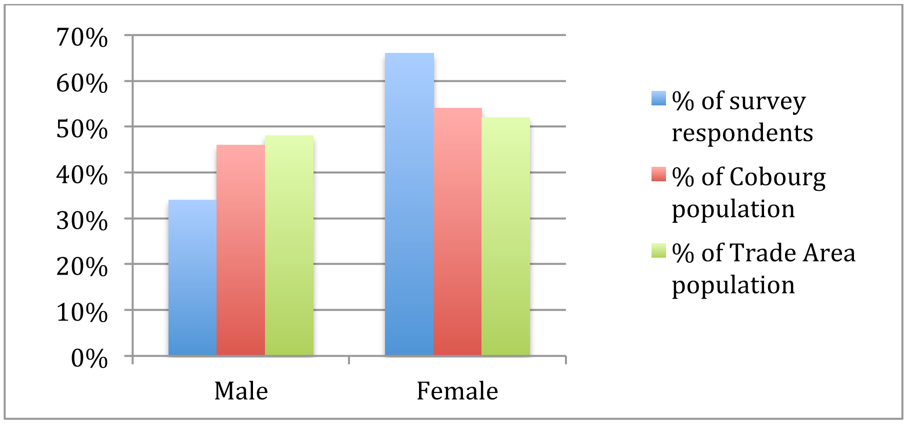

Figure 2 – What is your gender? (Question 29)

Figure 2 shows (in blue) the percentages of male and female respondents to the survey. As can be seen, a higher percentage of women completed the survey (66% of the total survey respondents), compared to the percentage of women in Cobourg (in red) and the Trade Area (in green), both of which are just over 50%. The survey data, therefore, may be weighted in favour of how women view the issues surveyed.

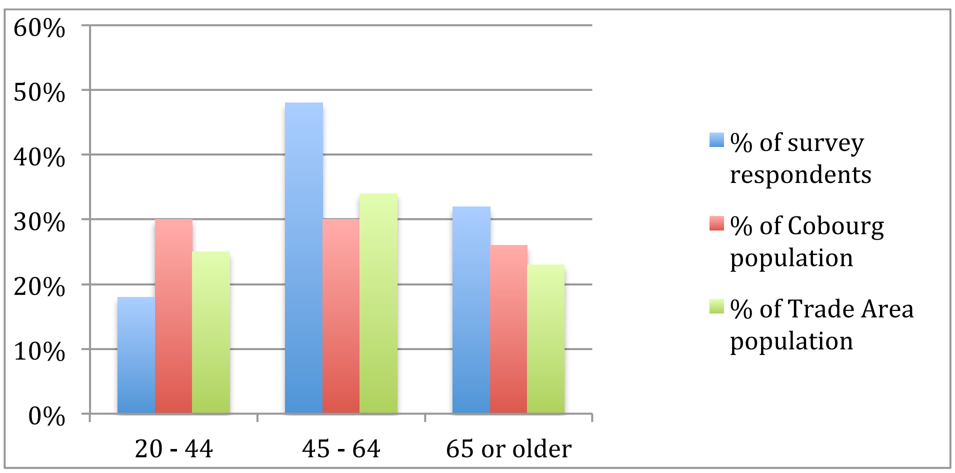

Figure 3 – What is your age? (Question 28)

Figure 3 compares the percentage of respondents in three age categories with those in Cobourg and the Trade Area populations. The graph shows that there is a significant difference in the distributions: survey respondents fall disproportionately into the two older categories (higher blue bars), compared to the population in Cobourg and in the Trade Area (red and green bars, respectively). Residents between 20 and 44 years are underrepresented in the survey data and interpretation of the survey data should take this discrepancy into account.

Not shown in Figure 3 is the proportion of people 19 years or under who responded to the survey – just 1% of the total survey respondents. Given that 13% of Cobourg residents are 19 or under, this group is very under-represented. While parents effectively respond on behalf of small children (for example, in Question 25 concerning services needed for families), the views of teens are not well represented in the data.

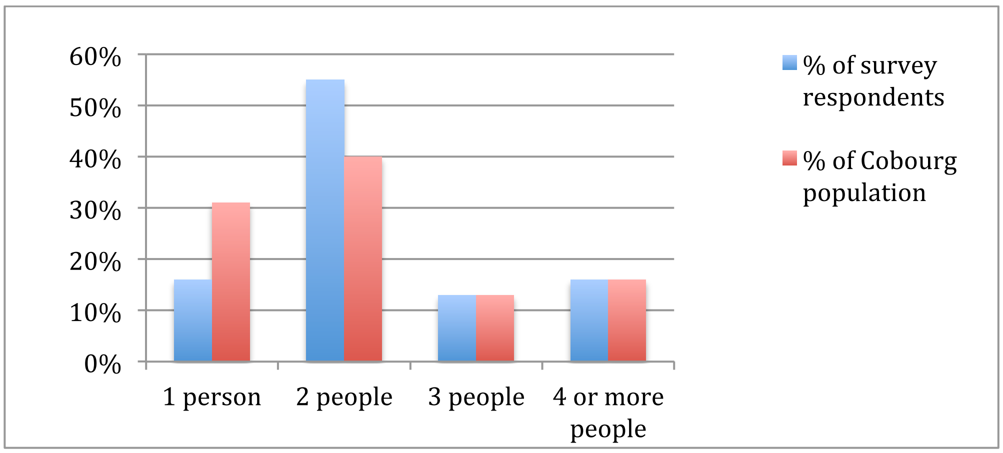

Figure 4 – How many people, in total, live in your household? (Question 30)

Over 50% of the survey respondents live in 2-person households, as shown in Figure 4. This proportion is considerably higher than the proportion for the Town of Cobourg. (No comparable data were available for the Trade Area for this measure). Conversely, 1-person households are under-represented in the survey sample.

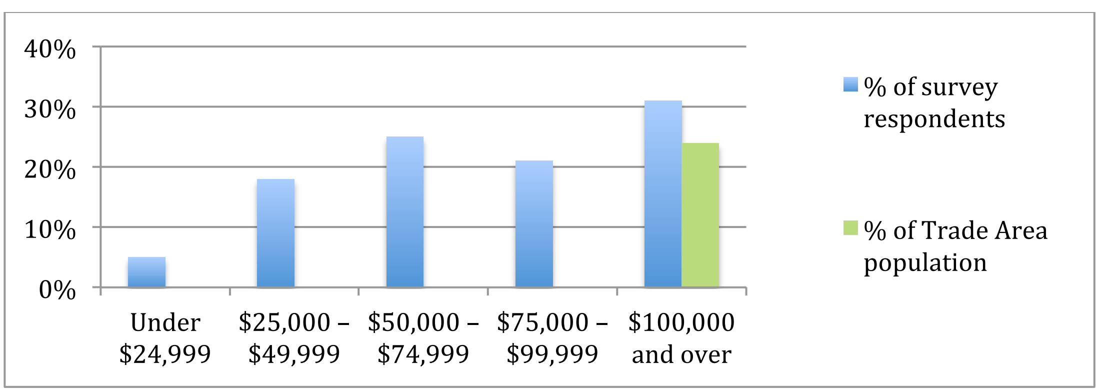

Figure 5 – What is your annual household income? (Question 31)

An important demographic indicator is category of household income[7], as shown in Figure 5. The graph shows that the distribution of survey respondents is roughly equivalent across the middle three categories of income, at around 20% in each. The survey sample may, however, over-represent respondents in the top category as evidenced by the comparison with the comparable category from the Trade Area population.

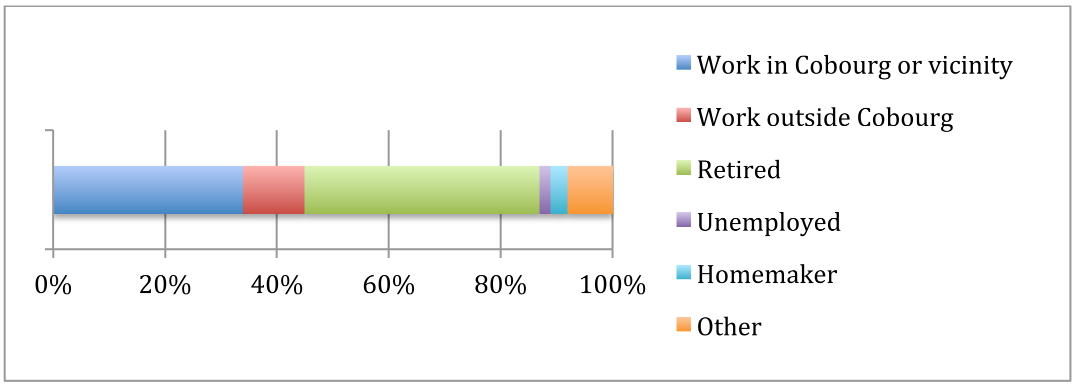

Figure 6 – Where do you work? (Question 32)

Finally, the workplace location of respondents is shown in Figure 6. Thirty-four percent (34%) of respondents *work in Cobourg* or within a 10 km radius of the Town, with an additional 11% working *outside* that range. Notably, 42% of the respondents are *retired*. This finding is consistent with the age of survey respondents (Figure 3), which is disproportionately older than in the overall population of Cobourg. The *other* category in Figure 5 (8%) includes respondents who were partially retired or self-employed.

Why Do Residents Come Downtown?

This section presents survey results on how often residents visit the Downtown and why they visit. Three questions on the survey addressed this issue.

[7] Unfortunately the categories of income used for this survey did not correspond to the ones for the Cobourg and Trade Area data. Thus, a direct comparison with the distribution in these populations is not possible, except for the top income category ($100,000 and over).

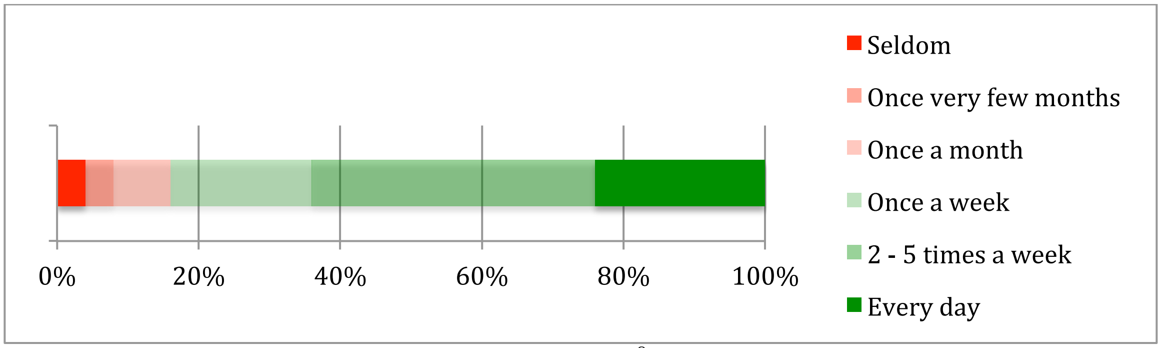

Figure 7 – How often do you visit the Downtown[8]? (Question 1)

The majority (84%) of respondents to this survey visit the Downtown at least "once a week" (Figure 7). Indeed, 64% come Downtown more frequently than "once a week".

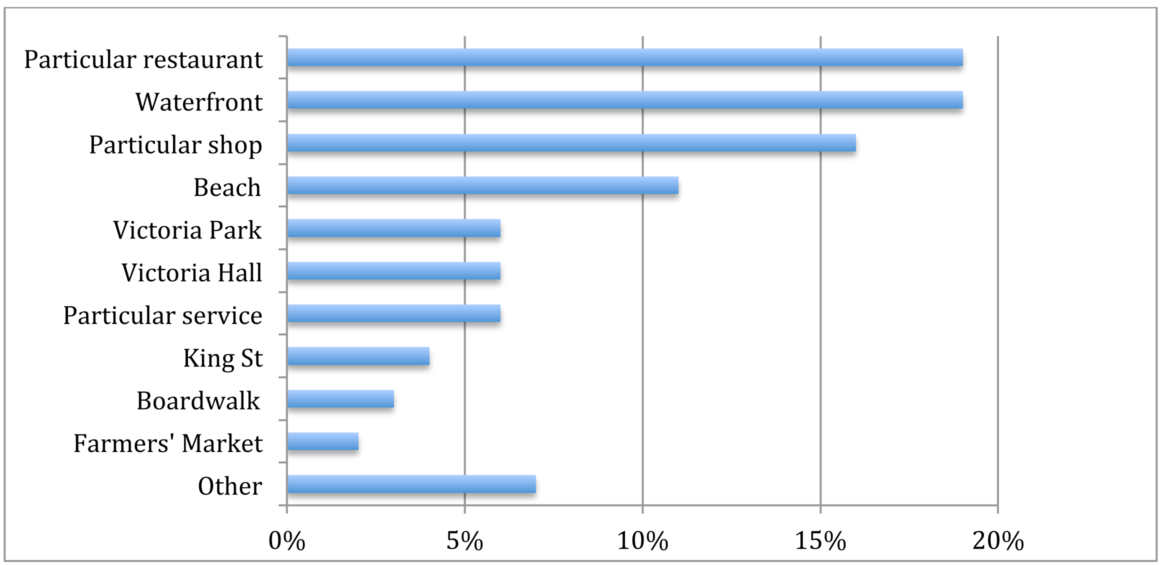

Figure 8 – What is your favourite place Downtown? (Question 2)

Survey respondents were asked to name their favourite place Downtown. Figure 8 presents the frequency with which various locations or types of businesses were mentioned. Restaurants, retailers and services that were mentioned specifically by name have been grouped into categories (i.e., *Particular restaurant*, *shop* and *service,* respectively) as shown. Downtown *restaurants* are most frequently mentioned as residents' favourite locations, accounting for 19% of the total. Notably, outdoor locations (specifically, the *wa-*

[8] In this and subsequent Figure captions, the term "Downtown" is used in place of "COBOURG DOWNTOWN VITALIZATION AREA", which is the term used in the survey.

terfront, beach, Victoria Park, King St, and the *boardwalk*) were named as a favourite by a total of 43% of respondents. Locations less frequently given (which fell into the *other* category) include the Art Gallery of Northumberland and the Park Theatre.

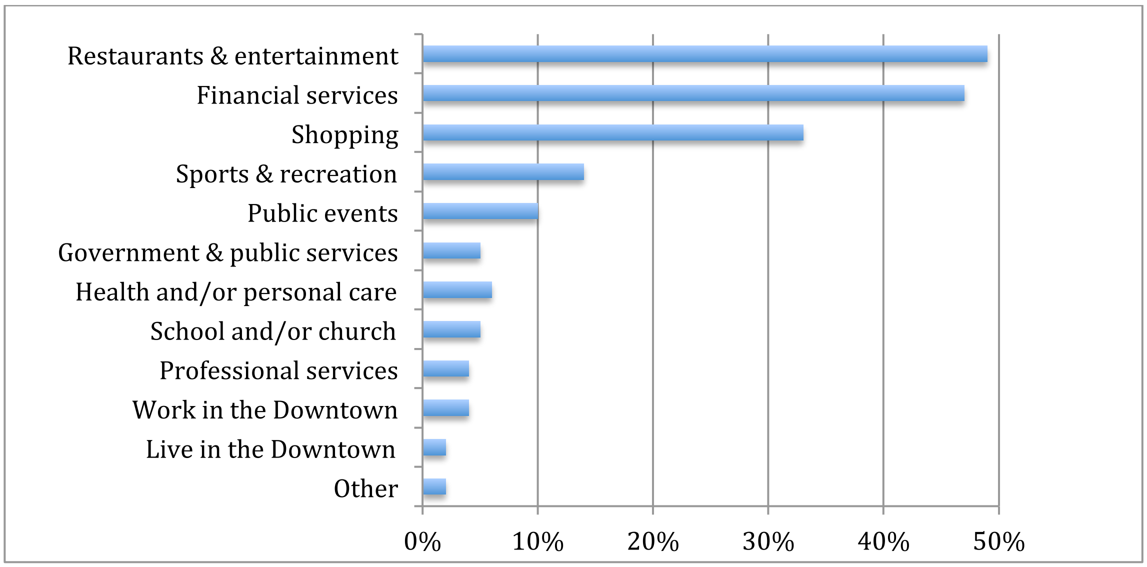

Figure 9 – What are the top two reasons you choose to visit the Downtown? (Question 3)

As reflected in Figure 9[9], the main reasons respondents visit the Downtown are for *restaurants and entertainment* (48%), for *financial services* (47%) and for *shopping* (33%). In addition, two other categories of activities – *sports & recreation* and *public events* – account for 10% or more of respondents' reasons for visiting. A more detailed breakdown of the frequency of use of retail and business services will be provided in the next section. Breakdown of respondents' Downtown attendance for activities such as entertainment, recreation and special events will be presented later in the **Activities in the Downtown** section.

Views on and Use of Retail & Services Downtown

The Cobourg Downtown has over 230 retail and service businesses that serve both the Town and the Trade Area. This section presents information on respondents' reasons for

[9] In this question and others where respondents were allowed more than one response for a question, percentages are based on total respondents (rather than the total number of responses). Thus the percentages in the various categories can sum to greater than 100%.

shopping in the Downtown, estimates of how much they spend, and how frequently they visit these Downtown shops and services.

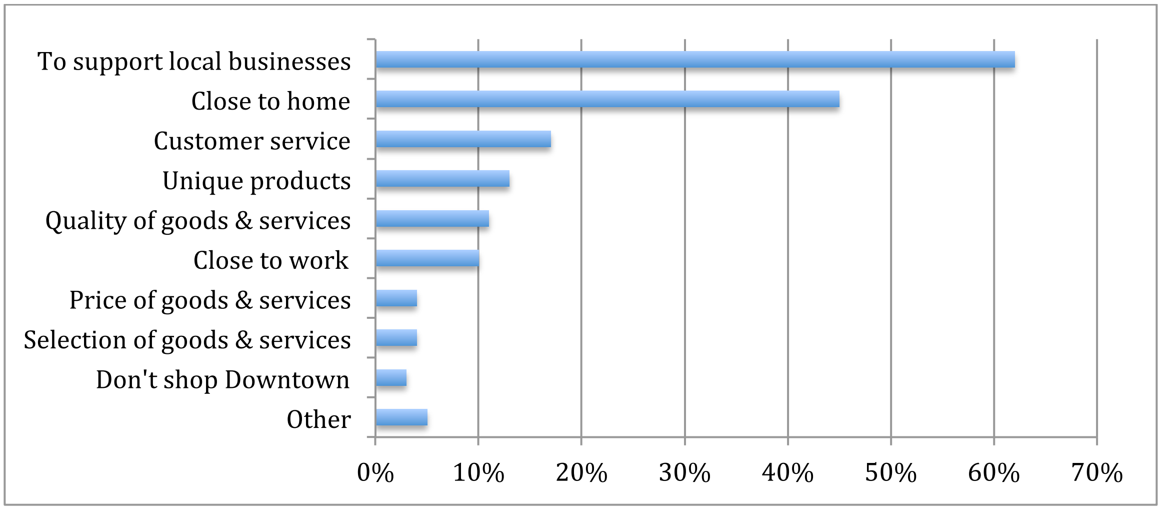

Figure 10 - What are the top two reasons you choose to shop in the Downtown? (Question 7)

When asked to give two reasons for shopping in the Downtown (Figure 10), respondents most frequently mentioned *to support local businesses* and because Downtown is *close to home. Customer service* was rated third, but much less frequently (17%). *Price* and *selection of goods and services* were mentioned least, at 4% each.

Residents were asked how they find out about local businesses or services. Figure 11 shows that *word-of-mouth*, followed by *newspaper* sources were mentioned most frequently (73% and 67% respectively). *Flyers, radio, Internet* and *bulletin boards* were named in uniformly decreasing frequency from 37% for *flyers*, down to 12% for *bulletin boards*.

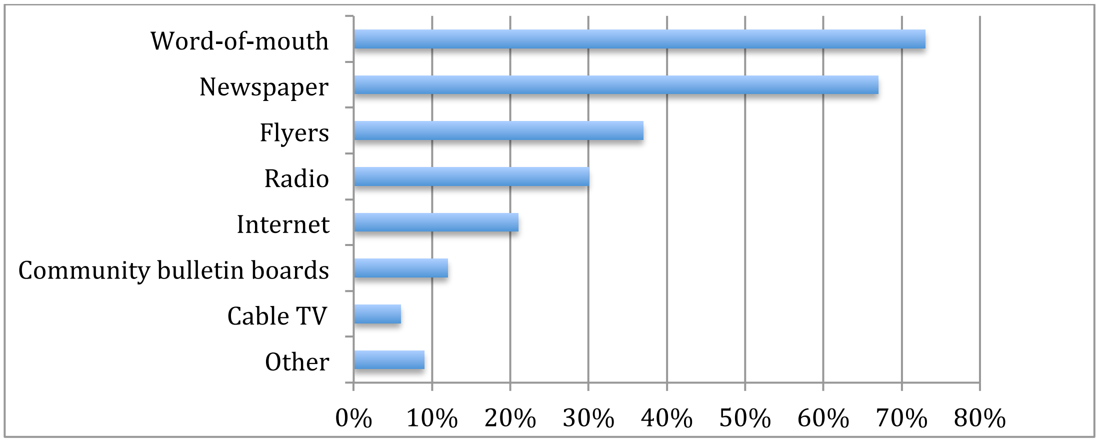

Figure 11 - How do you usually find out about local businesses or services? (Select all that apply) (Question 22)

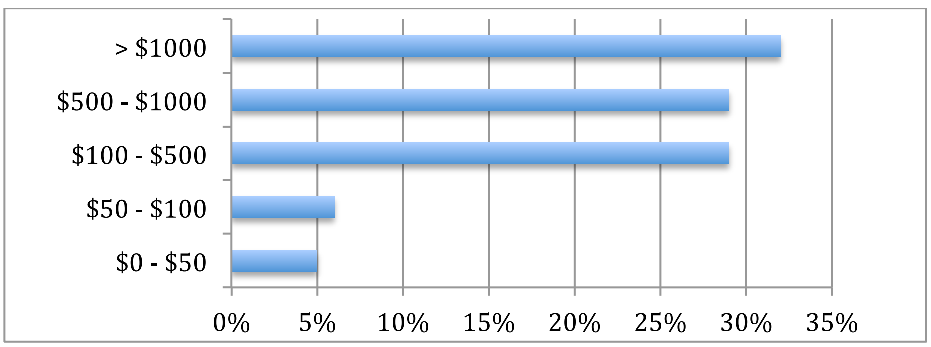

Figure 12 – How much do you spend each year on shopping and services in the Downtown? (Question 8)

Figure 12 shows respondents' estimates of the amount that they spend each year on shopping and services in the Downtown. Respondents were asked to include retail items purchased (e.g., clothing) services purchased (e.g., health care, financial or professional services) as well as restaurants and entertainment. The majority of responses were almost evenly divided (at around 30%) between the top three categories, as shown in Figure 12.

Two questions on the survey queried residents on their frequency of use of the Downtown businesses. The results are summarized in Figures 13 and 14.

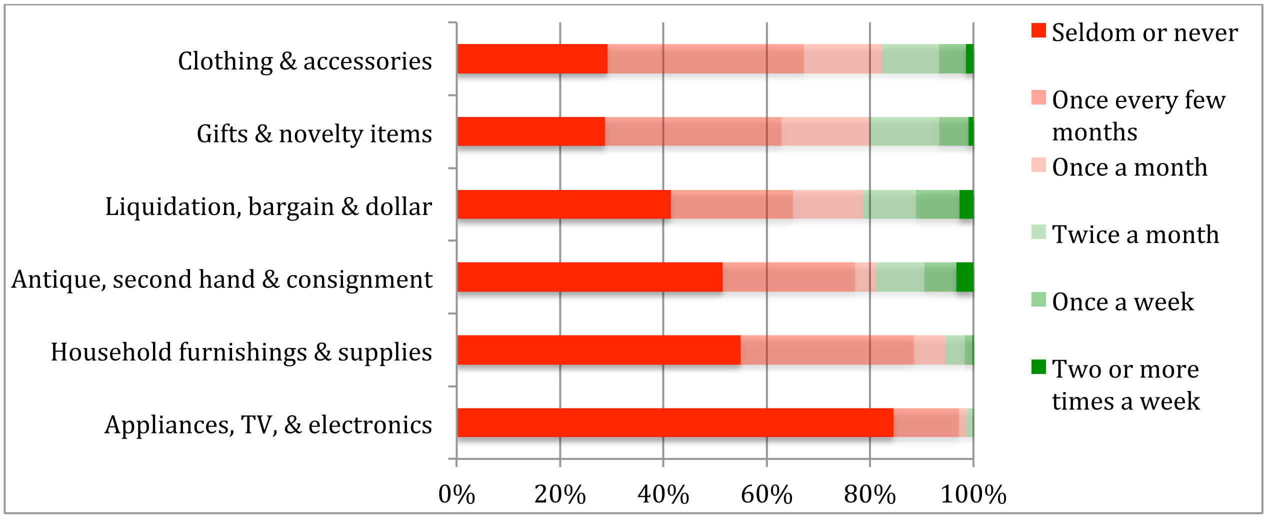

Figure 13 – How often do you visit the Downtown for the following retail businesses? (Mark one answer for each category) (Question 4)

Figure 13 indicates that retail businesses attract the majority of residents only infrequently. For every category of item, more than 60% of respondents shop only "once every few months" or "seldom or never". However, the first four categories of retail business listed on the graph do attract a small proportion of respondents (about 20%) on a more regular basis – "twice a month" or more, as coded in green on the Figure.

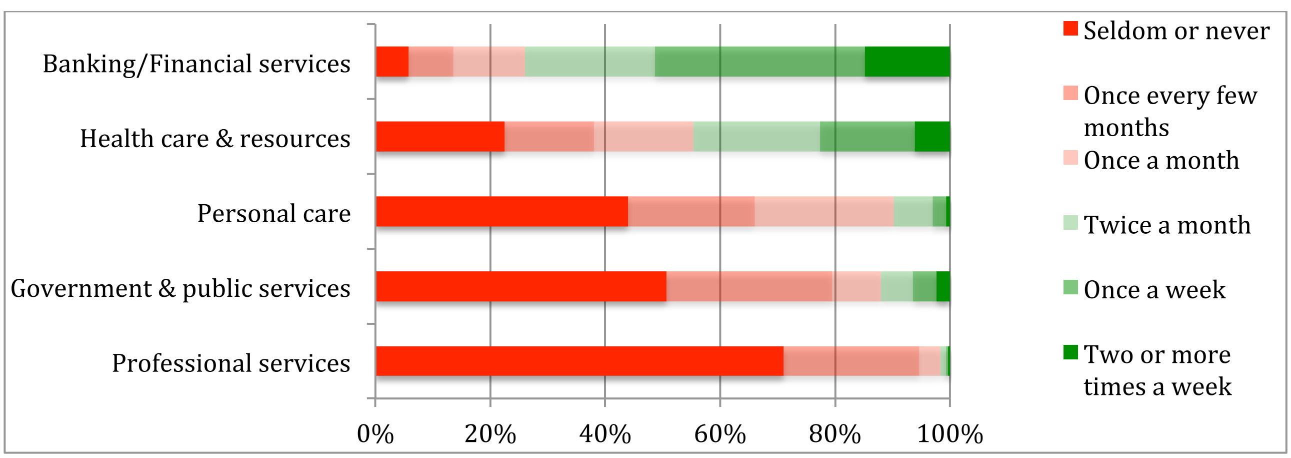

Figure 14: How often do you visit the Downtown for the following services? (Mark one answer for each category) (Question 5)

The results shown in Figure 14, consistent with the results from Question 3 (Figure 9), indicate that *banking and financial services* account for most visits – 86% of respondents visit at least "once a month" for these services and more than one-half visit at least "once a week". By contrast, *government & public services*, as well as *professional services* were visited mainly "once every few months" or less. Use of *personal care services* such as hair and esthetics was at least "once a month" for 34% of respondents, although 43% of respondents used these services "seldom or never", a results that may reflect the predominantly female orientation of these services. The frequency of use of *health care* and associated resources in the Downtown is fairly evenly distributed across the response categories.

Improvements to Downtown Businesses

The previous section presented survey results on residents' use of businesses Downtown. This section provides their opinions on the improvements that they think would help Downtown businesses, including the additional shops and services.

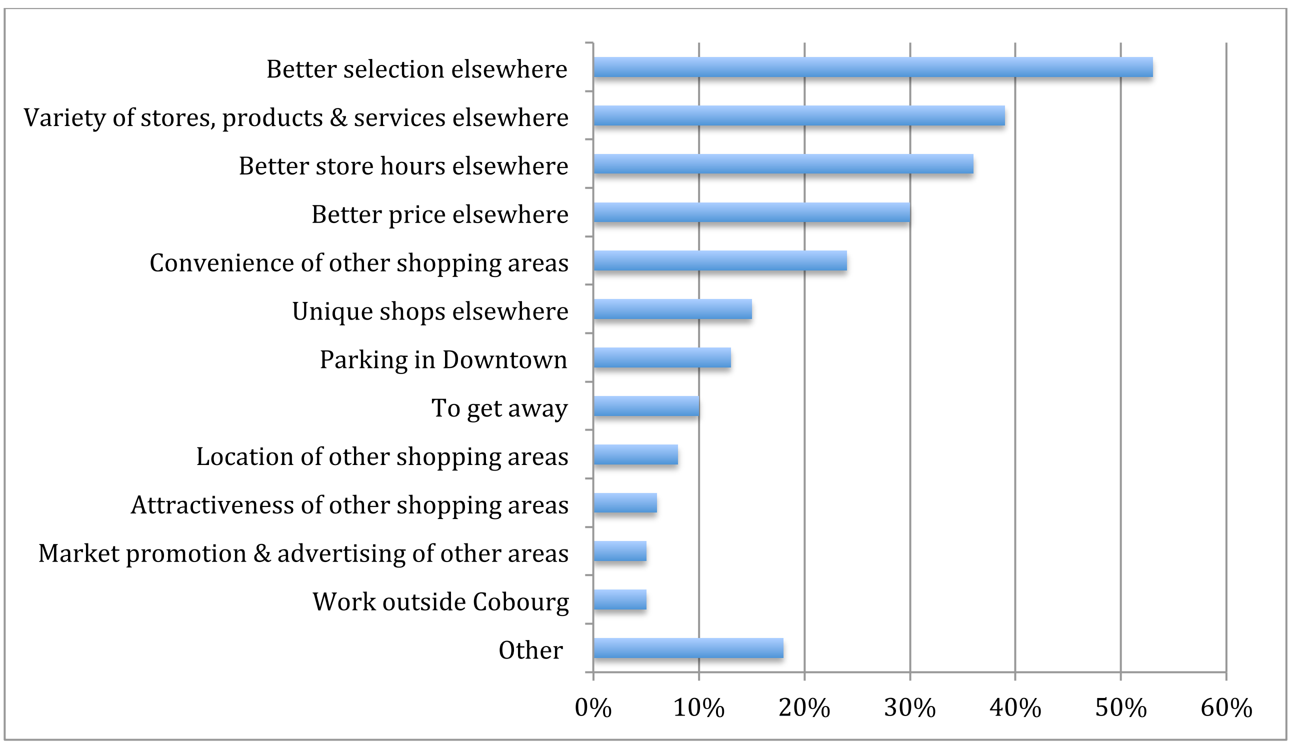

Figure 15 – What are the main reasons that you shop outside the Downtown? (Select no more than 3 reasons) (Question 9)

Recall that Figure 10 presented results on why respondents choose to shop in the Downtown (Question 7). Figure 15 shows results from the opposite – why they choose to shop *outside* the Downtown. Better *selection, variety, store hours, price* and *convenience* were named as the top five reasons. *Other* reasons such as *better quality* and *customer service elsewhere* were mentioned, but not frequently. These results are the inverse of those presented in Figure 10. For example, whereas *better selection* was named as the top reason for shopping elsewhere as shown in Figure 15, it was named only infrequently as a reason for shopping Downtown, in Figure 10. In this sense, the opinions expressed in the answers to Question 9 are corroborated by answers to Question 7.

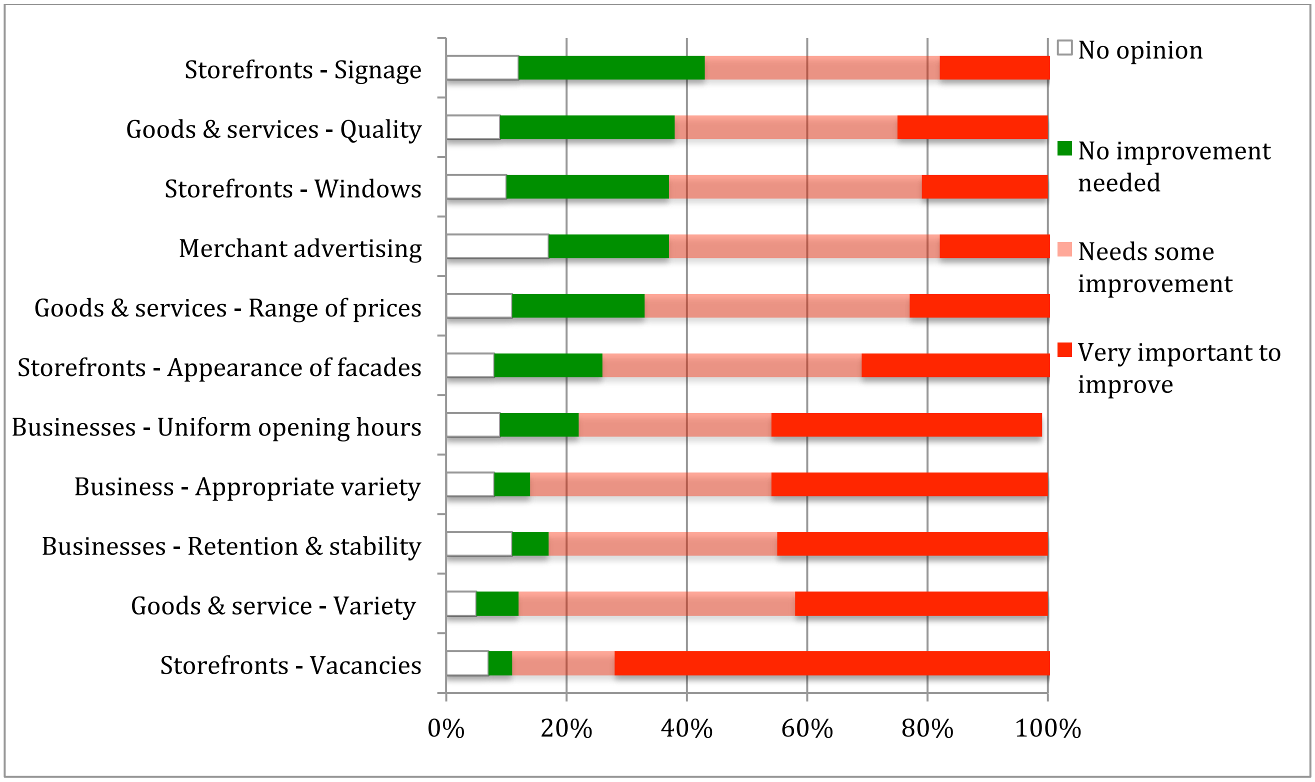

Figure 16 – Please rate the need to improve the following aspects of the businesses in the Downtown. (Question 10)

How can Downtown businesses be improved? At least 60% of respondents feel that all aspects listed in the Figure 16 "need some improvement" or are "very important to improve" (with one exception: *store front – signage)*. Moreover, at least 40% feel that the following five aspects are "very important to improve": *uniform opening hours, appropriate variety of businesses, retention & stability, variety of goods & services* and *storefront vacancies.* Once again, the answers to this question are corroborated by the answers to Questions 7 and 10. For example, *opening hours* are an issue that is highlighted consistently across the answers to these questions.

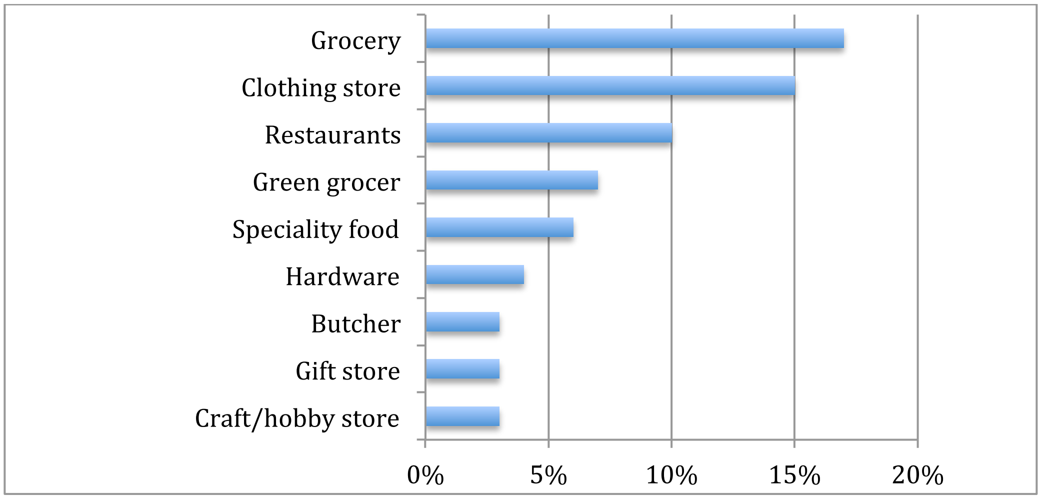

Figure 17 – What additional businesses or services do you think are needed in the Downtown? (Question 11)

In response to Question 11, residents offered 1852 suggestions for additional stores or services that they thought were needed Downtown. Furthermore, a huge variety of suggestions were made. Figure 17 shows the most common recommendations, with *grocery* topping the list at 315 of the total (17%). (Note that the percentages in this graph are based on total responses.) In addition, the categories of *green grocer, butcher* and *specialty food* were each highlighted, for a total of 16% of additional responses. *Clothing stores* of different types (for men, for women, for children as well as "general" clothing) were mentioned second most-frequently at 15%. Further down the list, the *gift store* and *craft/hobby store* categories were also mentioned (more than 50 times each, constituting 3% of the total each). Antique store, bookstore, coffee shop, dry cleaner, shoe repair, walk-in clinic, washrooms, art gallery, bed & bath store, photo shop, shoe store, flower shop and many others were also mentioned.

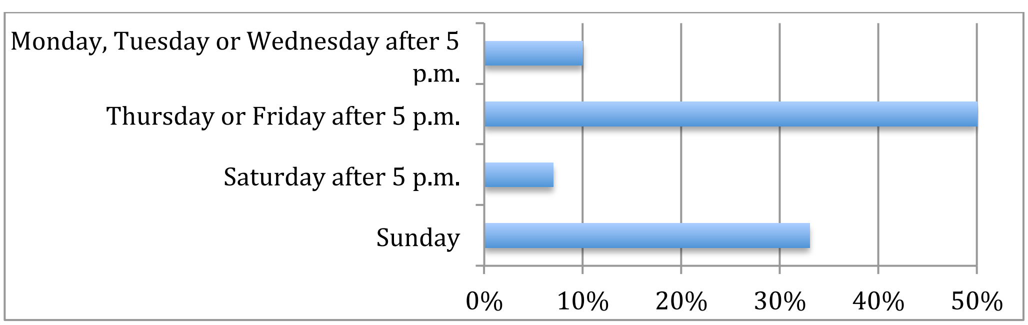

Figure 18 – If you were to shop during extended hours, when would you be most likely to shop? (Select one only) (Question 12)

Respondents stated their preferences for additional store opening hours, as shown in Figure 18. The majority (50%) preferred *Thursday or Friday after 5 p.m.,* followed by *Sunday* (at 33%).

A total of 623 respondents offered further comments, in open text format, regarding retail and services in the Downtown (Question 13). A scheme was developed to categorize these comments, yielding 1255 suggestions. The results (which ran to 60 pages of text) are not provided in this report. However, Table 1 (starting on the next page) offers the percentage of responses in each category and the issues that consistently emerged in each.

Table 1 – Percentage of additional comments regarding retail shopping or services in Downtown in each category, with brief summaries of issues noted (Question 13)

CATEGORY	%	ISSUES
MARKETING & COMMUNICATION		
Communication	2%	**Increase/Improve advertising of special events/town features in and out of town, on and off line** (e.g. electronic billboards, posters, street/pole banners, mall maps, Facebook, wagjag, Twitter)
Branding	3%	**Strive to create a unique experience** for connecting, socializing, lingering, shopping; **Strive to create a buzz, more excitement and imagination, new energy and creativity, modernity, open for business feeling** (e.g. music, buskers, street life, murals, sidewalk cafes/patios, festivals, quality arts, mix of premium and mid tier businesses)
Marketing	2%	**Improve Town website**; Elaboration and continuation of ideas expressed above under 'Communication' and 'Branding' (e.g. Promotion of restaurants, shopping options, market, and local quality food; Creation of destination getaways as in 'Golf and Inn', 'Home Tours and Lunch', local artist events, etc.); Hire a Marketing Co-ordinator
Benchmarks	3%	Many mentioned - generally in order of frequency: **Port Perry, Picton/Bloomfield/PEC, Port Hope,** Niagara-on-the Lake, Oakville, Kingston, Westport, Central European small towns; specific references to ideas in Peterborough, Bobcaygeon, USA
ECONOMIC DEVELOPMENT		
Food & beverage	2%	**Consider more casual ones, and with outdoor focus** - wider variety, later closing, near harbour/waterfront, family style, upscale food trucks/carts, market setting, cafes, awnings, enclosed heated patios, authentic ethnic
New business ideas & approaches	8%	**Most suggestions related to food/drink/fresh items** (e.g. grocery store, deli, gourmet pizza, cheeses, fresh fruits & vegetables, fine butcher, fish monger, artisan local brewery, refit convenience stores to offer fresh produce, year-round market, gelato, flowers, tea shop, prepared healthy meals, outdoor cafes) **Some suggestions related to families/general merchandise/ recreation** (e.g. children's/young adult clothing, children's gifts, department store, wellness/yoga/running, modern – wider appeal – urban wares, furniture) **Some suggestions related to beach/waterfront** (e.g. boat and bicycle rentals, beach shops, yoga in park, coffee shops along beach, fast foods, licensed vendors, stores need to develop 'back' facades, avoid souvenir shops) **Mixed comments on presence of major brands**/retailers/satellite stores from big box stores in DT **versus** having **unique**, varied **shops** with broader appeal and reasonable prices

		Some suggestions related to getting people living and learning DT: (e.g. university/college, registry for needed businesses, nice apartments above stores)
Business retention	8%	**Recurring issues/questions in 3 main areas: 1) taxes** (e.g. too high?, possible tax breaks/incentives/rebates?, do landlords receive tax breaks for empty stores?); **2) rents** (e.g. too high?, possible cap?); and **3) vacancy rate** (e.g. are building owners on board with vitalization?) **Concern with presence of tattoo parlours, dollar stores, pawn shops**; Support to **keep LCBO**; Concern over cost of structural improvements in old buildings, signage restrictions
Businesses/services needed OR not needed?	17%	**Overwhelming reiteration of themes: Get rid of tattoo parlours, low end bargain and pawn shops; Increase variety of mid-range, affordable stores/services with wider appeal, especially food related** (see above); **Keep LCBO**
For the business owners	6%	**Mixed reactions to customer service** (to some -friendly, helpful, individualized, to others, the opposite); Continued **concern over high costs** in many stores and **lack of 'cutting edge products'**; Continued requests for consistent and better store hours
Business & store hours	9%	**Overwhelmingly similar comments wanting consistent and extended store hours** (e.g. weekdays until at least 6 pm for residents working out of Cobourg and especially in the summer, Sundays)
DBIA & Town support to businesses	4%	**Stakeholders (e.g. DBIA, Town, businesses) need to work together**
Effects of tourists	<1%	Mostly isolated comments included use of parking tickets/stickers for resident parking advantage particularly during high use times
PHYSICAL IMPROVEMENTS		
By-laws	1%	Two main requests reflected in many comments: Enforce bylaws (e.g. property repairs, cycling/skateboarding/smoking on sidewalk, snow removal, dogs off leash on beach; Reduce red tape /rules to attract businesses
Downtown appearance	16%	**Many negative comments that highlight the following requests: Clean up** (e.g. dirty streets, storefronts, parking lots, back alleys); **Paint** (e.g. cohesive colours, contemporary look); **Maintain and Repair** (e.g. roofs where water/snow drip, snow removal, upper levels of stores, historic aspect); **Co-ordinate signage; Beautify** (e.g. plant trees, sidewalk parkette, community art); **Light up** (e.g. streets at night, Vic.Hall) ; and the recurring theme of **Fill Vacant Buildings** (e.g. Town looks abandoned, dead, neglected)
Downtown accessibility	3%	Make DT **more pedestrian/ bike friendly, accessible; improve transit hours; snow/ice removal an issue**
Downtown safety	2%	**Some** safety **concerns** are **related to people** (e.g. loitering, skateboarding, poor lighting) and **others to do with building disrepair** (e.g. freezing water dripping on sidewalk)
For building owners	2%	**Many negative comments over absentee landlords, owners with empty buildings and/or buildings in disrepair – consistent message that**

		property owners need to be held accountable
Facilities	1%	**Need more and accessible washrooms**
Parking for residents	7%	**Parking is a major issue that needs to be addressed (**many specific comments/ideas e.g. multi-story lot on Covert St., longer than 2 hour allowance)
DOWNTOWN ACTIVITIES		
Living Downtown	<1%	Isolated comments included concern with traffic/ noise when bars close
Events	1%	Mostly isolated suggestions included Loyalist Days, Heritage Days, promotion of local artists, fashion shows, open air concerts on King St., music at market square, more and longer festivals; varied opinion on closing streets - e.g. Second St. or King St. - to vehicular traffic
Sports & outdoor recreation	<1%	Mostly isolated suggestions included that rink is too small, extend boardwalk west, retain access to pier, increase activity surrounding marina
Cultural aspects	1%	Mostly isolated comments included put art gallery at street level, develop an art community (e.g. specific regular theatre, theatre at the Park Theatre, large concerts at CCC, music at market square, use street as venue, small blues fest)
SPECIFIC DOWNTOWN LOCATIONS		
Victoria Park	<1%	Isolated comments included no barbeques, move Farmers' Market to Victoria Park
Beach	<1%	Isolated comments included new trees at beach, extend boardwalk west, visitors pay nominal sum to use beach
Trailer park	<1%	All three comments were in favour of getting rid of the trailer park
Harbour & Marina	<1%	Isolated comments included concern about condo overdevelopment and number of Canadian geese taking over
Victoria Hall	<1%	Isolated comments included V.H. is a jewel in crown, poorly lit, shabby winter flowerbeds /light wires, art gallery should have storefront space

Downtown Accessibility, Appearance, Safety and Cleanliness

A set of three questions asked residents to rate the need to improve various aspects of the Downtown.

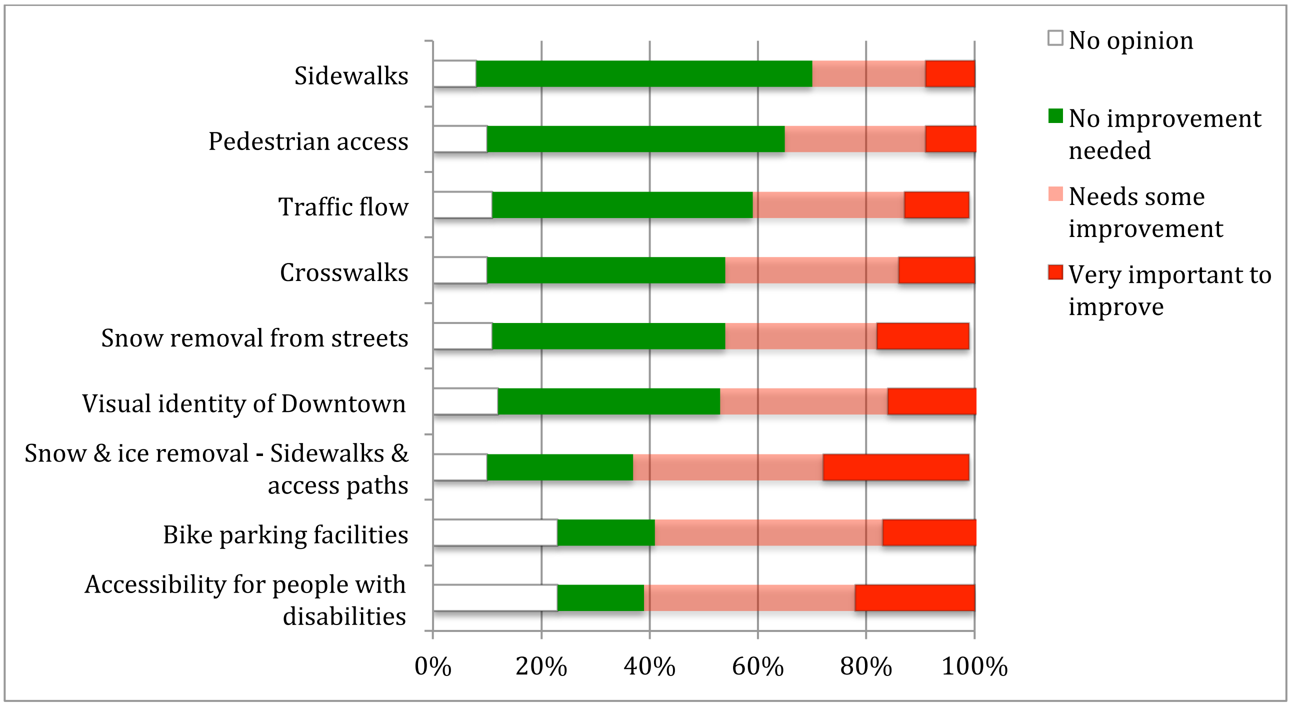

Figure 19 – Please rate the need to improve the following aspects of the accessibility to Downtown. (Question 14)

Figure 19 shows respondents' opinions about Downtown accessibility – issues such as sidewalks, signage, snow removal, etc. A majority felt that *sidewalks* and *pedestrian access* required "no improvement" (62% and 55% respectively). In other cases, opinion was divided. For example, concerning *crosswalks*, *snow removal from streets, traffic flow,* and *visual identity of Downtown*, about half of respondents felt that "no improvement" was necessary (44%, 43%, 48%, 41%, respectively) whereas half felt that "some" or "much improvement" was needed (46%, 45%, 40% and 46% respectively). However, *snow & ice removal on sidewalks and access paths* was deemed to need at least "some improvement" (62%) – indeed, 27% of respondents felt that this latter issue was "very important to improve". Concerning *bike parking facilities* and *accessibility for people with disabilities* (at the bottom of the Figure), a higher proportion of respondents had "no opinion" (23% compared with around 10% for the previous issues). Despite this, respondents (around 40% in both cases) did feel that at least "some improvement" directed to both these issues was necessary.

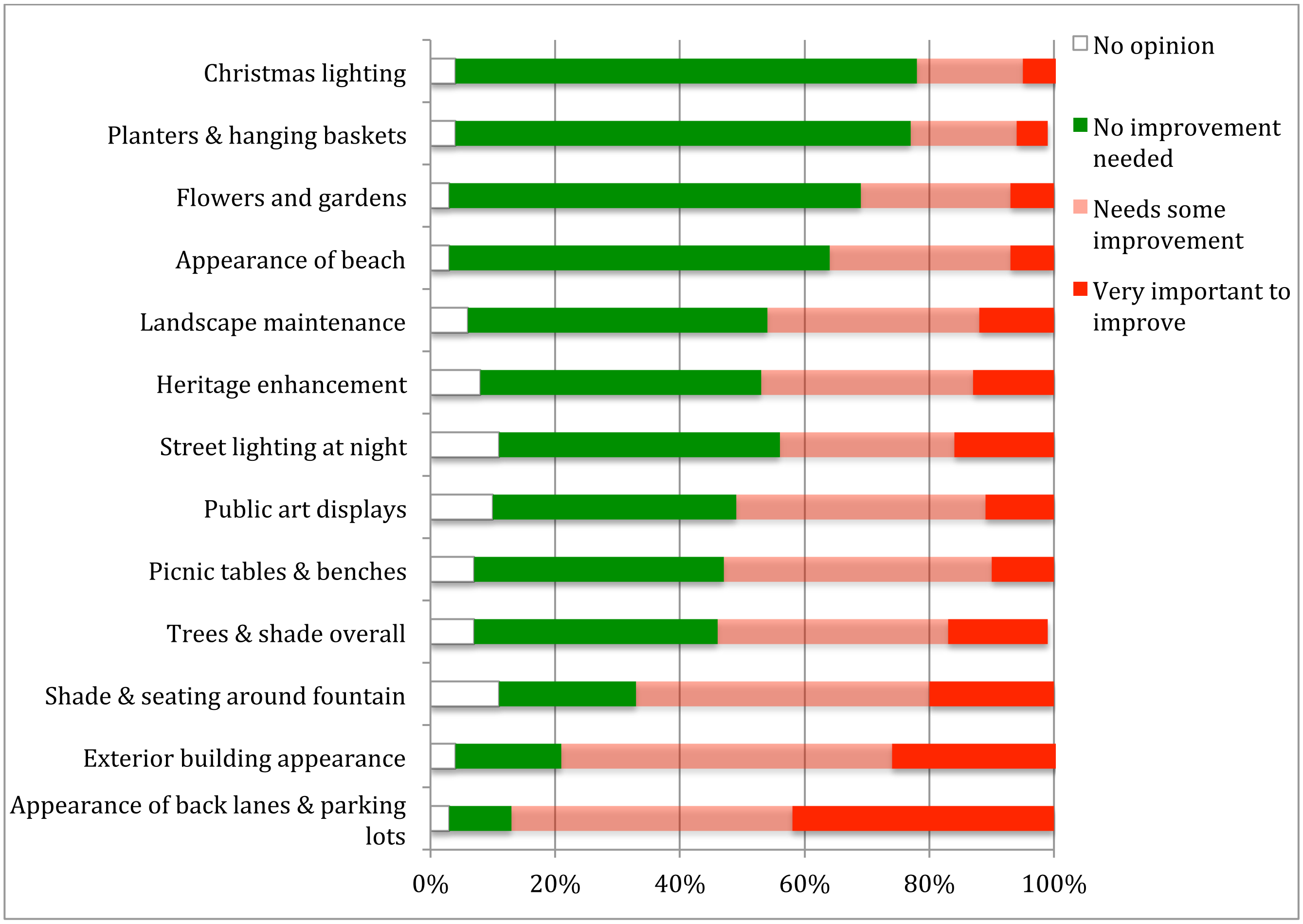

Figure 20 – Please rate the need to improve the following aspects of the appearance of Downtown. (Question 15)

A second question concerned residents' opinions about the appearance of Downtown. The results are shown in Figure 20, with the categories ordered from least to most in need of improvement. As shown by the solid green bar, a majority of respondents (at least 60%) were satisfied with the first four categories of Downtown appearance – they either had "no opinion" or felt "no improvement [was] needed". Opinions about the need for improvement increase as one goes down the list. Concerning *public art, picnic tables & benches* and *trees & shade overall*, more than 50% of respondents thought at least "some improvement" was necessary (light and dark red bars together). A clear majority felt that improvements to *exterior building appearance* and *appearance of back lanes & parking lots* were warranted.

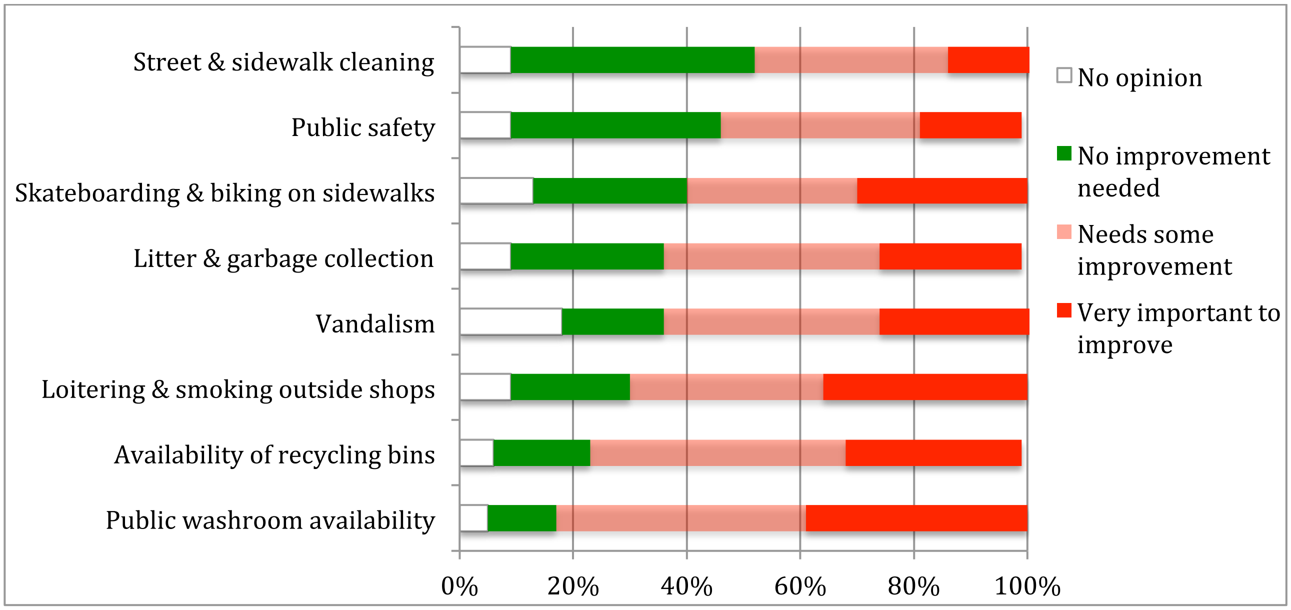

Figure 21 - Please rate the need to improve the following aspects of the safety and cleanliness of Downtown. (Question 16)

Finally, on the matter of the safety and cleanliness of Downtown (Figure 21), close to a majority of respondents felt that all categories listed needed at least "some improvement". The categories are again ordered from least to most in need of improvement. Whilst opinion was equally divided – about 50/50 – on the issue of *street & sidewalk cleaning* (at the top of the list), the *availability of recycling bins* and *public washrooms* are clearly in need of improvement, according to respondents.

Parking Downtown

Four questions in the survey addressed the issue of travelling and parking in the Cobourg Downtown.

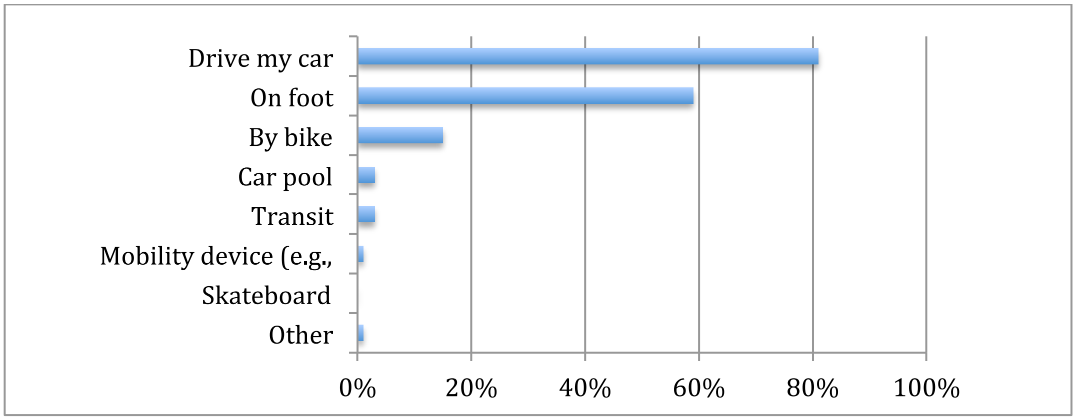

Figure 22 – What are the two main ways you travel to get Downtown? (Question 17)

Respondents were asked to select the ways that they travel Downtown. Figure 22 shows that most drive their cars (81%), but many also come on foot (59%) and some by bike (15%)

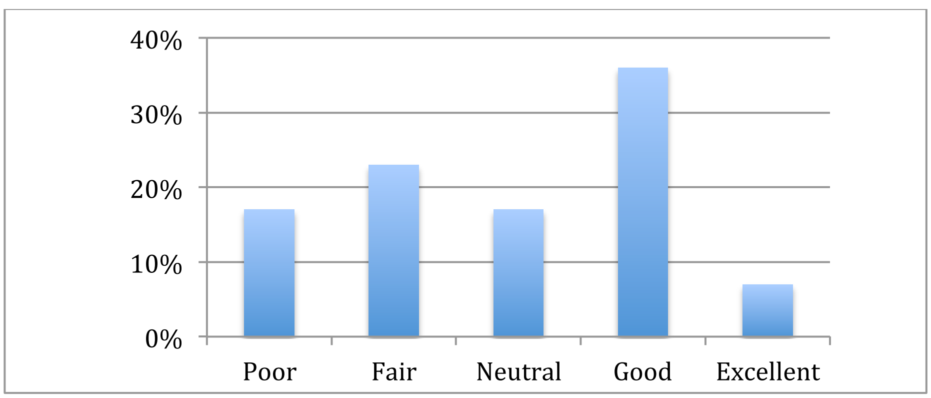

Figure 23 – If you drive or car pool, how would you describe the parking facilities in Downtown? (Question 18)

Question 18 asked residents who come by car to rate the parking facilities in Downtown on a scale from Poor to Excellent. Figure 23 shows that opinion is almost evenly divided between those who consider that parking is Good or Excellent (43%) and those who consider it only Fair or Poor (40%).

When asked whether the Town should charge for parking in the Downtown (Question 19), respondents overwhelmingly answered "No" (82%). A follow-up question (Question 20) asked "If the Town decided to charge for parking, what method and rate would you recommend?" Respondents generally suggested metered or pay-and-display methods. Nonetheless, 28% of the respondents to this question recommended against paid parking in the Downtown.

Activities in the Downtown

The Downtown attracts residents for many other reasons beyond retail shopping and services. This section gives some information on those other activities that draw people Downtown.

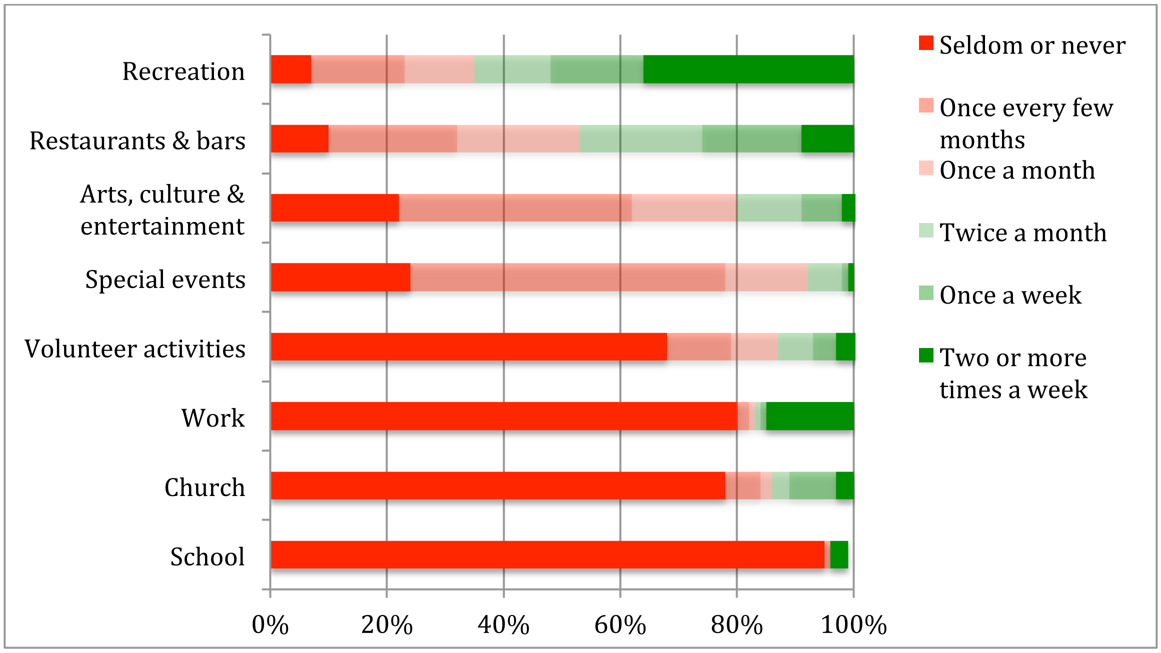

Figure 24 – How often do you visit the Downtown for the following activities? (Question 6)

Figure 24 gives a breakdown of the frequency of visiting Downtown for activities other than retail and service. The results are consistent with those from Question 3 (Figure 9) presented previously – that recreation and restaurants attract residents to Downtown. Almost 70% of respondents visit at least "once a month" for *restaurants and bars*, while 77% visit at least "once a month" for *recreation*. Moreover, 52% of respondents come for *recreation* at least "once a week". Frequency of attendance at *arts, culture and entertainment* is not as high, with 56% listing attendance at these functions as "once a month" or "once every few months". Similarly, attendance at *special events* such as lectures or festivals was "once every few months" for 54% of respondents. However, these types of activities are available only infrequently, in contrast to recreational activities such as walking.

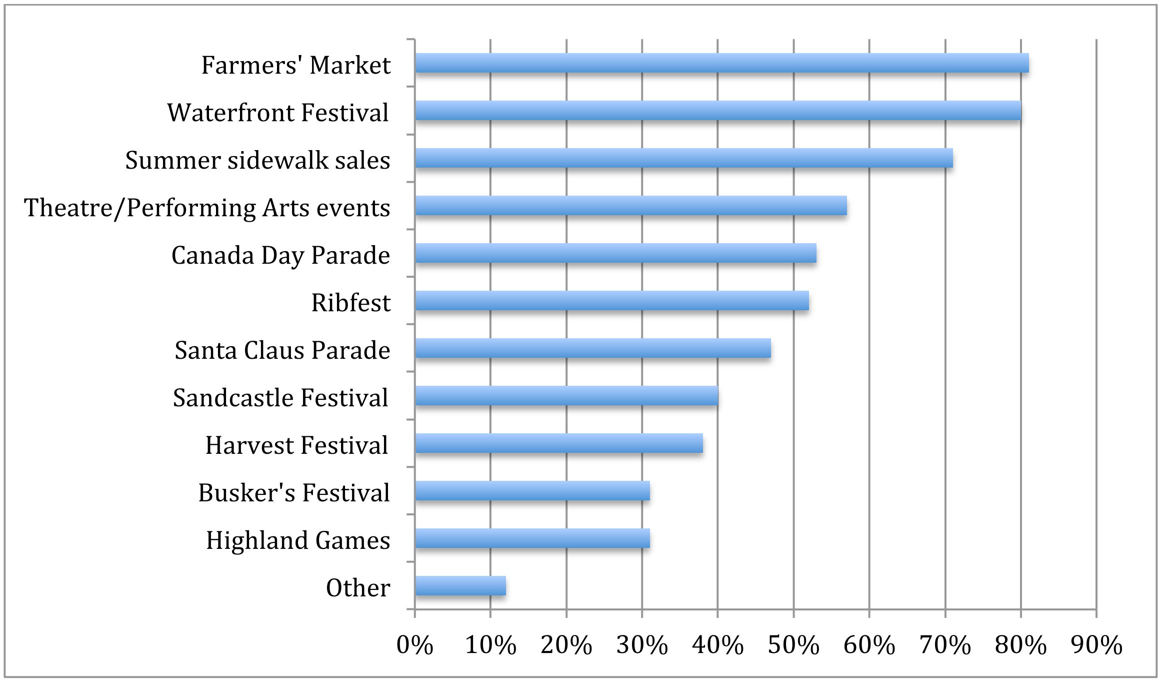

Figure 25 – What Downtown events have you attended in the past year? (Select all that apply) (Question 21)

Special events offered in the Downtown are quite popular with respondents as shown in Figure 25. At least 30% of respondents have attended the listed events in the past year. The *Farmers' Market* and the *Waterfront Festival* were both particularly attractive, with 80% of respondents attending. The category *other* included such events as Remembrance Day ceremonies and concerts in Victoria Park.

Additional Facilities and Services Needed Downtown

The previous section indicated some of the activities that presently attract people Downtown. This section concerns the additional facilities or services that residents would like to see Downtown, including facilities that address the needs of youth, families and seniors.

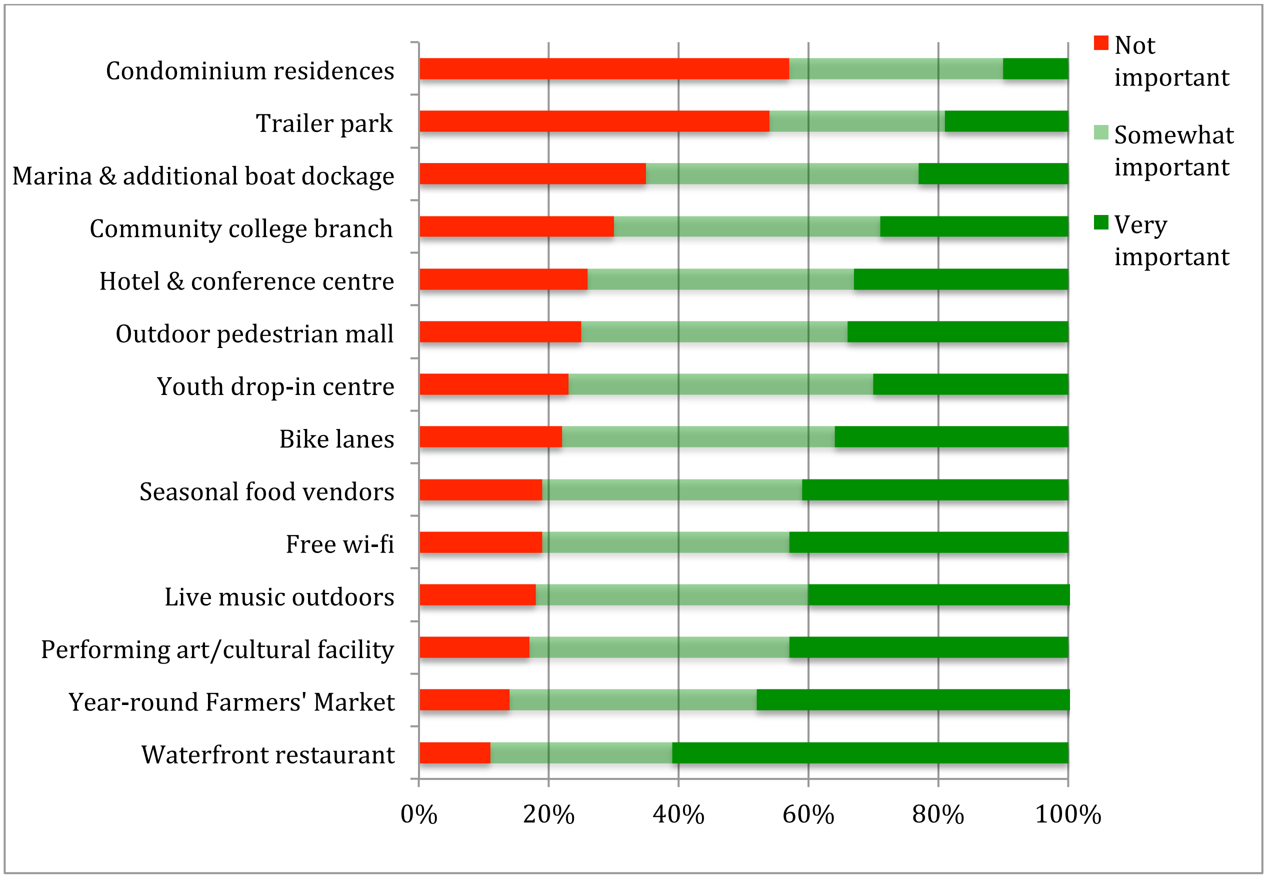

Figure 26 - Please indicate the importance of developing the following in the Downtown. (Question 23)

Respondents were asked about the importance of developing new facilities in the Downtown (e.g., *hotel & conference centre*) or further developing existing facilities (e.g., *trailer park*). Figure 26 presents the responses, on a 3-point scale from "not important" (red) to "very important" (green). The facilities in question have been listed in increasing order of importance to develop (i.e., green bars), according to the responses. While all items on the list were given some support for development (by at least 40% of respondents), those listed at the bottom were considered particularly desirable. Indeed, over 80% of respondents said that *seasonal food vendors, free wi-fi, live music outdoors, performing arts/cultural facility, year-round Farmers' Market* and a *waterfront restaurant* were "somewhat" or "very important" to develop.

Finally, a series of three questions polled residents on facilities needed for particular groups: youth, families and seniors. Respondents were permitted up to three responses for each of these questions. All responses relevant to the given question were pooled and the total was used as the basis for calculating the percentages shown in the graph.

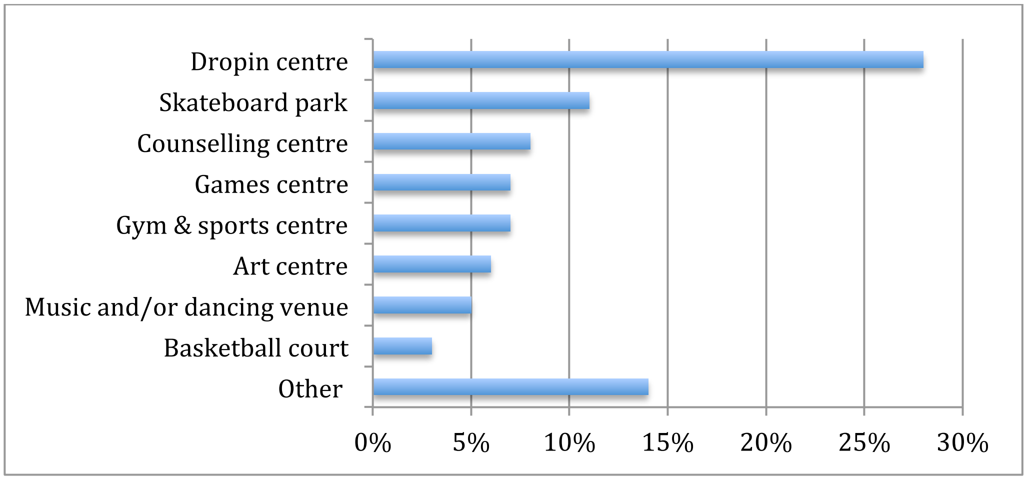

Figure 27 - Please suggest any services or facilities for youth you feel are needed. (Question 24)

The first question (Question 24) addressed the needs of youth as shown in Figure 27. Respondents offered a total of 696 relevant suggestions; however, most of these suggestions were not made by youth, since this group was not represented in the survey sample. Notwithstanding, the primary suggestion – overwhelmingly (at 28%) – was for a *drop-in centre*. Various sports facilities were frequently mentioned (e.g., *skateboard park, basketball court*), as were arts-related facilities such as a *venue for music and dancing*. A *centre for counselling* was third in the list of frequent suggestions. Additionally, suggestions in the *other* category were coffee shop, bike park, jobs, movies, indoor pool, and a children's splash pad.

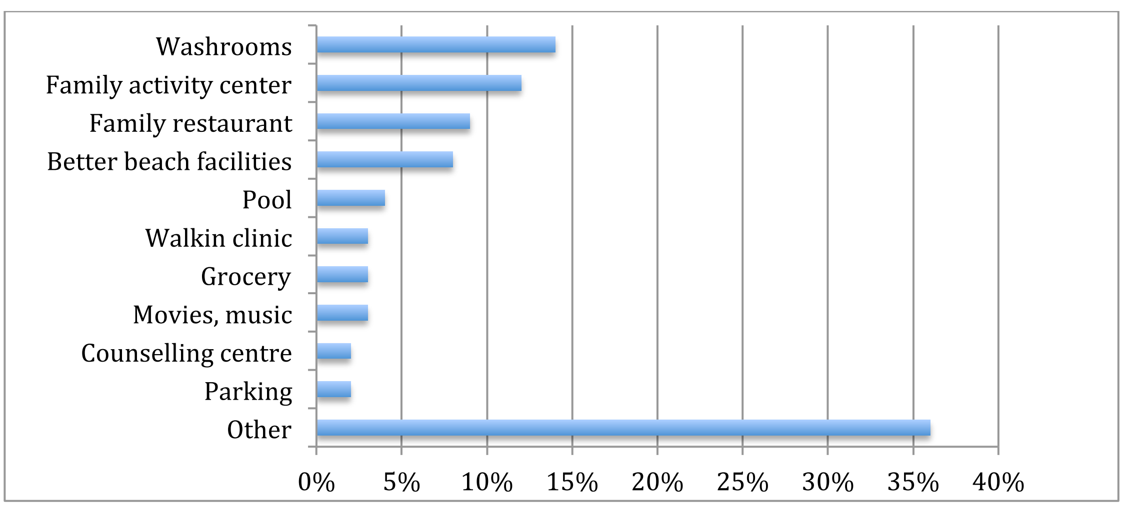

Figure 28 – Please suggest any services or facilities for families you feel are needed. (Question 25)

Survey respondents offered a total of 611 relevant suggestions for services and facilities needed for families. The suggestions ranged widely and it was difficult to categorize them. The main themes are shown in Figure 28. *Washrooms* (including change rooms for the beach and diaper change facilities) topped the list at 14% of the responses. Next most-frequently mentioned was the need for a *family activity centre*, possibly including daycare or baby sitting. Respondents commented on the need for a *family-oriented restaurant* and improved access to the facilities around the *beach* (e.g., picnic tables, better garbage pickup). The many *other* suggestions included the need for better bike paths, kids' events, playground, and family recreational activities.

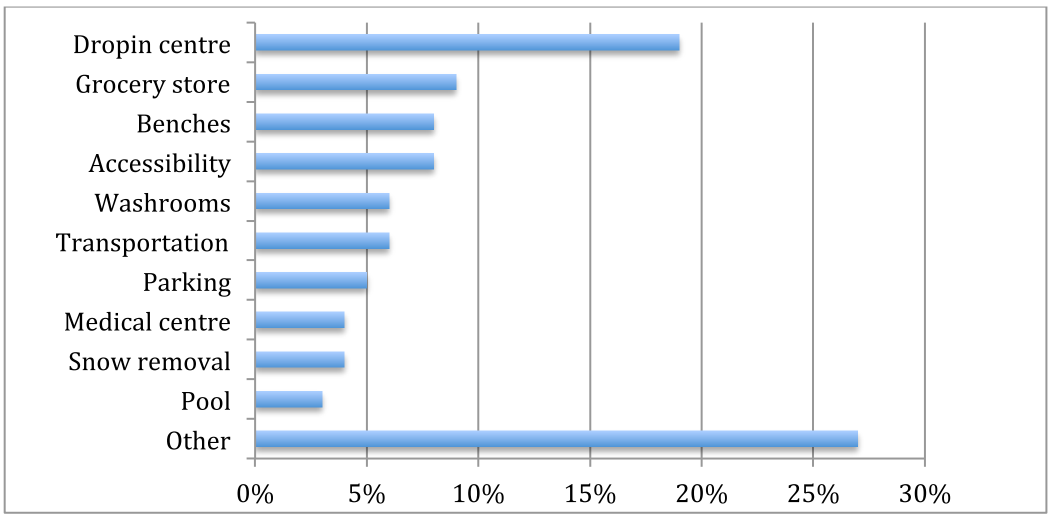

Figure 29 - Please suggest any services or facilities for seniors you feel are needed. (Question 26)

Respondents offered 586 relevant suggestions for facilities for seniors. The ten categories that were most frequently mentioned are shown in Figure 29. Again, a *drop-in center* tops the list at 19% of the responses. A *grocery store* is second. Many of the other categories mentioned reflect seniors' needs for rest areas and accessibility (e.g., *benches, snow removal*). The *other* category, which is extensive, encompasses affordable housing, coffee shop, home care, recreational services, shaded rest areas.

Additional Comments from Residents

A total of 491 respondents offered further comments, in open text format, regarding the Downtown (Question 27). A scheme was developed to categorize these comments resulting in 721 suggestions.[10] The detailed results (comprising 45 pages of text) are not provided in this report. However, Table 2 offers the percentage of responses in each category and the issues that consistently emerged in each.

Table 2 – Percentage of additional comments regarding the Downtown in each category, with brief summaries of issues noted (Question 27)

CATEGORY	%	ISSUES
		MARKETING & COMMUNICATION
Communication	3%	**Take action on vitalization** (we don't need more surveys; what happened to previous revitalization efforts?); publish the results of this survey; importance of co-operation and tapping into opinions of youth
Branding	4%	**Mixed comments: Town feels charming, but rundown**; needs **excitement** (e.g., music, street vendors, joie de vivre); **too much focus on visitors & seniors**; importance of a clear **vision** for DT, heritage awareness, identifying DT gateways, filling vacancies, creating a festive atmosphere; keep the big box stores out
Marketing	2%	**Importance of marketing DT to residents and day-trippers** (in GTA and outside); treat visitors as guests; use web-based media; improve banal radio ads; reward residents for using DT businesses
Benchmarks	<1%	**Port Perry** is the main example
		ECONOMIC DEVELOPMENT
Food & beverage	3%	**Better food options at the waterfront**, including waterfront restaurant, cafes, food trucks/vendors at beach; consider indoor Farmers Market
New business ideas & approaches	5%	**Suggestions related to development** (e.g., develop pier & waterfront; make pedestrian mall on King or close street on Sunday; hotel/conference centre; piazza-type space; pop-up businesses) **Some suggestions for DT features** (e.g., central map board of DT with event posters, outdoor board games, street vendors, music at Market & waterfront, murals, dog-specific area, green initiatives, fresh produce) **Suggestions for encouraging vitalization** (e.g., DT "bucks", Venture fund to facilitate unique shops)
Business retention	6%	**Consistent comments that business rents are too high;** **Perception that taxes are too high;** Concern that landlords are permitted to keep buildings empty; keep LCBO in DT; retailers need support (e.g., incentive program)
Businesses/services needed OR not	12%	**Consistent comments to get rid of "cheap" and "sleazy" stores on main street (bargain, dollar, etc); need for practical & affordable stores** (e.g., grocery, hardware, kids clothing) and more diversity; some opinion that

[10] Many respondents offered more than one comment.

needed?		**"high-end" shops are needed; keep LCBO;** increase night-life options for youth (e.g., dancing, cafes); possibly consider allowing chain stores as retail anchors
For the business owners	2%	**Mixed opinion re customer service:** good in some shops, non-existent in others; merchants need to work together
Business & store hours	4%	**Longer & more consistent opening hours needed (**later on workdays, also Sunday)
DBIA & Town support to Businesses	1%	A few comments that Town rules & bureaucracy inhibit retail success; Town will need to invest (e.g., purchase some properties)
Effects of tourists	2%	**Tourists monopolize the beach and Victoria Park in summer & leave a mess behind** (and they provide no benefit to the Town); need for better handling of visitor parking & congestion
PHYSICAL IMPROVEMENTS		
By-laws	2%	**Enforce bylaws re building appearance** (e.g., fine landlords), **beach** (re tents, BBQs, dogs); also for noise
Downtown appearance	11%	**Significant & numerous concerns about "dirty", "tacky" and "tired" appearance of DT; urgent need for building repairs & beautification, cleanup of backlots & parking lots, more frequent emptying of garbage, cleaning of sidewalks** (bird dropping, snow/ice removal) **Mixed opinion on heritage requirements:** consider loosening them, as they limit creativity; **but by contrast,** need to protect & repair sites; some building owners do not comply; signage & colour consistency in DT are needed; Concern about impression created by vacant storefronts; some requests for more trees
Downtown accessibility	6%	**Improve accessibility and safety on sidewalks** (e.g., keep merchandise off, keep bikes and skateboarders off, improve snow/ice removal on sidewalks & dripping eaves that make winter walking hazardous); increase number of cross-walks; **improve bus service especially on Sunday and holidays;** get cars off King St; mixed opinion re bike lanes (undesirable vs essential); bump-outs and hitching posts are impediments; better signage to places of interest and to parking
Downtown safety	2%	Some concerns about **loitering, drug dealing**; opinions that **more police patrols needed**
For building owners	3%	**Make property owners accountable for building disrepair & appearance; perception that owners do not care that their buildings are empty;** empty upper floors should be occupied
Facilities	1%	All comments pertain to **need for public washrooms**
Parking for residents	5%	**More parking facilities needed;** 2-hour limit does not work; idea of a parking garage
DOWNTOWN ACTIVITIES		
Living Downtown	<1%	Isolated comments on noise

Condo develop-ment	2%	All comments call for **no more condo development**
Events	2%	Some requests for more events & more variety, especially for families & young professionals; opinion that Ribfest should be moved elsewhere;
Sports & outdoor recreation	<1%	A few comments requesting continuous path along waterfront, DT dog park and wading pool
Cultural aspects	<1%	Isolated suggestions: more support for arts & theatre, need for music space, more festivals
SPECIFIC DOWNTOWN LOCATIONS		
Victoria Park	1%	Isolated comments that Park should be protected, that it is crowded in summer; need for bleachers, more shade
Beach	3%	**Beach is too crowded with visitors on weekends**; garbage collection not sufficient; parking is difficult
Trailer park	3%	**Most comments advocate getting rid of trailer park** (this is prime wa-terfront land that could be put to better use)
Harbour & Marina	1%	Isolated comments suggesting development of waterfront (e.g., hotel, bike rentals, attractions for boaters); concern about too many geese
Victoria Hall	<1%	Isolated comments of appreciation for V.H.
MISCELLANEOUS	10%	Cobourg is a beautiful town with great potential in a spectacular loca-tion; this effort is long overdue; **Thanks for the opportunity to have input**

Conclusions

The overall response to the Residents Survey was very good, though the sample does over-represent the views of older residents who live in 2-person households (likely retired couples) and under-represents younger residents – in particular teens. Furthermore, it somewhat under-represents the views of residents who live outside Cobourg, but who use the town as a centre for shopping and services – for example, residents living in Northumberland County outside Cobourg. The sample is also slightly biased towards the views of women and may also be biased towards more affluent respondents. These biases in the sample must be taken into account in the conclusions that are drawn from the data.

Survey respondents visit the Downtown often – the majority more frequently than once a week. Downtown events such as the Farmers' Market and the summer festivals are significant attractions; a majority of respondents attended at least half of the Downtown events last year. Residents particularly love the outstanding outdoor landmarks of Cobourg – the waterfront, beach and Victoria Park; a majority of respondents use these facilities and others twice a month or more for recreation. In addition to recreation, residents visit the Downtown mainly for the restaurants and entertainment, for the financial services and – to a lesser extent – to shop. Banking and related financial services draw a majority of residents at least once a month. Also, services providing health care and associated resources are used at least monthly by a majority of respondents. Perhaps surprisingly, other professional services (e.g., accounting, insurance, etc.) are seldom or never used. Overall, Downtown retail businesses such as clothing, gifts, dollar and household furnishing stores are not frequently visited by most respondents (less than once a month).

Overwhelmingly, respondents say that they patronize the Downtown to support the local businesses, but convenience ("close to home") is also a key factor for using Downtown businesses. By contrast, respondents are attracted to shopping opportunities outside Cobourg because these businesses provide a variety of products and services, and better selection, price and hours – issues noted as needing improvement in the Cobourg Downtown. Business opening hours were consistently highlighted in the survey responses, including in many additional comments. Inconsistency in store hours was noted as a particular frustration. Residents want to see longer hours, with a preference for evening shopping on Thursday and Friday. Opinions about customer service in Downtown are mixed. While customer service was mentioned third most-frequently as a reason for shopping in the Downtown, comments by respondents suggest that while some businesses provide excellent service, at others it is lacking.

While a variety of suggestions were offered concerning additional stores or services needed Downtown, the need for food-related shops, such as a green grocer, butcher and specialty food stores – as well as affordable restaurants – was consistently highlighted. A waterfront restaurant and a year-round Farmers' Market were both considered highly desirable by residents. In comments, respondents pointed out that there are no convenient sources of fresh produce for residents living Downtown.

Residents are very concerned about the vacant business premises in the Downtown – a reflection of the poor retention and stability of shops and services. Respondents wonder if rents are too high. The many empty storefronts, coupled with the poor upkeep of many buildings and the several discount-type stores, create – according to respondents' comments – a tired and rundown feeling in the Downtown. The poor appearance of back lanes and parking lots is an added concern. Many respondents expressed the opinion (in comments) that the building owners are not being held accountable for maintaining their properties. For example, timely snow and ice removal from sidewalks in the winter was noted as a concern. While residents are generally satisfied with the flowers, planters and landscaping done by the Town, they feel improvement is needed in recycling facilities, and litter/garbage collection, especially on the beach after weekends. Finally, respondents demanded significant improvement in the availability of public washrooms.

The issue of the parking facilities in the Downtown provoked a mixed reaction – both positive and negative – from respondents, many of whom drive to use the services Downtown. Not surprisingly, residents do not want to pay for parking, although when pressed they suggest either metered or pay-and-display methods.

There were many, many suggestions made for facilities geared to special groups: youth, families and seniors. High on the list for each group was a centre ("drop-in" centre) with activities tailored to the needs and interests of that group. Additional suggestions for youth focused on sports, music and – importantly – counseling services. For families it was more diverse: e.g., family-focused restaurant, pool, beach facilities. For seniors, the emphasis, in addition to a drop-in centre, was on medical and transportation services and improving accessibility (e.g., snow removal).

Notwithstanding the concerns about Downtown that were expressed by respondents, their final comments can be summed up as follows: "Cobourg is a beautiful town in a spectacular location and with great potential". Respondents felt that this Vitalization survey was long overdue and they appreciated the opportunity to have input. They look forward to the actions that will address their concerns.

Appendix A – Residents Survey 2013

See separate attachment.