



OAKVILLE

## REPORT

COMMUNITY SERVICES COMMITTEE

MEETING DATE: JULY 14, 2014

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**FROM:** Parks and Open Space Department

**DATE:** June 16, 2014

**SUBJECT:** Harbours Feasibility and Capacity Study - Phase 1

**LOCATION:**

**WARD:** Town wide

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### RECOMMENDATION:

That the report from the Parks and Open Space department entitled *Harbours Feasibility and Capacity Study – Phase 1* dated June 16, 2014 be received.

### KEY FACTS:

The following are key points for consideration with respect to this report:

- The Parks and Open Space department in conjunction with the City of Burlington and Region of Halton retained the consultant Touristics to undertake a Harbours Feasibility and Capacity Study with respect to recreational boating across the Region of Halton. This study reviewed mooring slips and capacity, but also launches ramps for recreational boating.
- As envisioned, at a high level the study was intended to undertake the following;
  - a) Provide a comprehensive analysis of the current harbour capacity within the Great Toronto Area/Golden Horseshoe region, and specifically Halton Region. Assess changing demographic profile of the area and impacts of these changes on the anticipated demand for recreational boating, trends of boating and berth requirements to determine if additional harbour capacity is warranted within Halton Region.
  - b) Investigate and analyze potential harbour locations within Halton region. This would include identify current inventory of marina assets, review recent marina construction in terms of costs, necessary attributes, investigate potential locations including parking and access, shoreline bathymetrics, wave action, prevailing winds and other issues such as dredging or algae/weed issues.

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- It was decided to split the study into a Phase 1 and Phase 2. If it was determined there was no demand for additional capacity based on the research, the requirement for identifying potential locations, costs, potential partnerships and requirements of new marina facilities within Halton Region would not be necessary.
- At this time staff is reporting back on the results of Phase 1 and based on the results of the consultant's research, Phase 2 as a separate RFP process would proceed and be issued in fall 2014.
- Similar reports will be submitted to respective Council's at Halton Region and City of Burlington
- The Harbours Feasibility and Capacity study is one of the major input documents (along with Sediment Management Study) into a Harbours Master Plan, scheduled to be initiated in 2015 subject to consideration through the 2015 budget process

## **BACKGROUND:**

As noted above, the consulting firm Touristics was retained by Oakville, Burlington and Halton Region (hereinafter *the partners*). The firm Shoreplan Engineering, with coastal engineering expertise was a sub consulting firm with Touristics. The Phase 1 Final Report is appended as Appendix A to this report.

Over the last number of years, the Parks and Open Space department has been taking a lead role in undertaking various reviews of the Harbours to ensure Oakville's harbours remain economically viable, sustainable and they continue to be destination locations for recreational boating, and premier waterfront park assets for town residents and visitors. For the economic sustainability and viability of the Harbours, reports include the Hemson study completed in 2011, (Oakville Harbours Financial Strategic Business Plan) as well as a Sediment Management Study, and Harbours Feasibility and Capacity Study.

To ensure our Harbours are located within attractive, functional and premier waterfront parkland, Council has highly invested in capital improvements to Bronte inner harbour parkland, Bronte Outer Harbour Waterfront Park (partially cost shared with Halton Region), and recently the Oakville Harbour West Parkland Rehabilitation project has been initiated that will provide a significant improvement in the aesthetics, functionality and accessibility of the parkland along the west side of the Sixteen Mile Creek. In order to retain the Harbours as functional and vibrant for recreational boating, lease renewal agreements are being pursued with boat and yacht clubs in both Oakville and Bronte harbour. Lastly, the Downtown Cultural Hub (DCH) study is reviewing optimal integration of the Oakville harbour area within the overall DCH study. Both harbours are considered prime assets within the Town and their continuance as vibrant, economically viable and sustainable business models,

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as well as attractive, recreational destination locations for residents and visitors, is vital to ensuring Oakville continues to be the most livable town in Canada.

The Harbours Feasibility and Capacity study reviewed recreational boating across the Region of Halton and investigated future demands over the next 5-20 year period. In addition, boating trends, demographics, type of vessel, was also reviewed.

It was decided by the partners to undertake the study as a 2 phased approach. Phase 1 would review recreational boating demand and trends over the short and long term (5-20 years) and if the demand was evidence based, Phase 2 would undertake the investigation and analysis of potential marina locations within Halton Region waterfront.

As background information for the Phase 1 portion of the study;

Oakville owns the Oakville Harbour and leases much of Bronte Harbour from the Federal Government. In total there are approximately 575 town operated mooring slips within Oakville and Bronte harbour. Various boat clubs are also present in both Oakville and Bronte harbours and each has a variety of mooring slips.

Burlington has a marina at LaSalle Park. LaSalle Park Marina is a recreational marina located on the north shore of Burlington Bay adjacent to LaSalle Park. The Marina is owned by Burlington but was funded by and is fully operated by the LaSalle Park Marina Association (LPMA) with approximately 220 mooring slips.

The Region of Halton leases the land base on which the Bronte Outer Harbour Marina is built and sub-leases these lands to "The Marina Group" who operates the marina facility with approximately 400 mooring slips.

At the present time all marina facilities are operating close to maximum capacity and maintain waitlists. Given the increase in population expected within Halton over the next 20 years there is a perception that demand for mooring slips will exceed current capacity. Oakville and Burlington, as well as Halton are waterfront communities with recreational boating contributing to the history, culture, and livability of these communities. As part of the study a number of factors including, economic, social, recreational trends, and boater preference needs was researched and analyzed with respect to determining whether additional demand for recreational mooring slips will be required in the near and long term.

This report provides Council an update on the work completed to date on the Harbours Feasibility and Capacity Study – Phase 1

## COMMENT/OPTIONS:

In their investigation and analysis Touristics has noted that the demand for additional mooring slips and launch ramps in Halton Region will be dependent on there (3) major factors;

- The ability of existing marina facilities within the market area to meet the current and future demand, and the overall occupancy rate of the marinas within the seasonal market area
- The growth in the number of power and sail boats in the seasonal market area and the changes in their length, beam and draft; and,
- The market area for seasonal slips and launch ramps exhibiting socio-demographic characteristics that are strong determinants of power and sail boating demand.

### Key Findings

#### *Boating Facilities in Halton Compared with the GTA/Golden Horseshoe Area:*

There are 41 boating facilities in the GTA/Golden Horseshoe Area between Scarborough in the east and St. Catharines in the west. Fourteen (14) are marinas and the remaining 27 are yacht and sailing clubs.

As shown in the Table below, although the occupancy rates and percentage of slips by length are similar, boaters at marinas and yacht clubs in Halton appear to be less well served than those in GTA/Golden Horseshoe area. As a percentage of total slips available, the GTA/Golden Horseshoe area offers twice as many transient slips as Halton and as a percentage of facilities, twice as many fuel docks. Although a higher percentage of facilities in the GTA/Golden Horseshoe area offer a pump out service, the number of slips per pump out is similar (i.e. 292 versus 336 in Halton). Both areas have insufficient on-site capacity to accommodate all the seasonal boats for winter storage (i.e. 71% in Halton versus 87% in the GTA).

The demand for additional slips is much higher in Halton than the GTA/Golden Horseshoe area as expressed by the number of boats on the waiting list as a percentage of occupied seasonal slips (i.e. 36% in Halton versus 16% in the GTA).

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	<b>Halton</b>		<b>GTA/Golden Horseshoe Area</b>	
Number of Marinas, Yacht, Sailing and Power Boat Clubs	8		41	
Seasonal Slips Occupied	1,310	96.8%	8,833	98.6%
Transient Slips as Percentage of Total Slips	2.5%		5.4%	
Percentage of Slips <30 feet	33.2%		20.2%	
Percentage of Slips 30 feet to <36 feet	44.0%		48.1%	
Percentage of Slips 36 feet to <46 feet	20.2%		22.9%	
Percentage of Slips 46 feet and over	2.6%		8.8%	
Percentage of Facilities with Fuel Docks	25%		53.7%	
Number of Slips Per Fuel Dock	672		424	
Percentage of Facilities with Pump Out	50%		78.0%	
Number of Slips Per Pump Out	336		292	
Percentage of Facilities with Launch Ramp	37.5%		53.6%	
Percentage of Slips with 30 amp or more power	51.5%		78.6%	
Percentage of Seasonal Boats Accommodated On-site for Winter Storage	70.8%		87.4%	
Number of Boats on Waiting List	470		1,470	
Boats on Waiting List as a Percentage of Occupied Seasonal Slips	35.9%		16.4%	

*Marina Rates and Fees:*

The rates charged at Bronte Outer Harbour Marina, Bronte Harbour, Oakville Harbour, and LaSalle Park Marina are comparable with those in the GTA/Golden Horseshoe Area given the product offering.

Marina operators throughout the GTA/Golden Horseshoe Area indicated that annual rate increases are typically held to three to four percent due to the highly competitive nature of the market place. Since there are no indications that marina operating costs will decrease in the future, it is expected that rates will continue to rise at this rate. One-time increases above three to four percent do occur when additional revenue is required for capital improvements. Rate increases at Bronte Outer Harbour Marina, Bronte and Oakville Harbours, and LaSalle Park Marina have consistently fallen within the area norms.

*Projected Population of Halton 2013 to 2031:*

The population of Halton 25 and older is projected to increase from 359,130 in 2013 (169,690 males, 189,440 females) to 403,450 by 2018 (196,980 males, 206,470 females), to 451,130 by 2023 (219,850 males, 231,280 females), to 498,180 by 2028 (243,090 males, 255,090 females), and reach 528,100 by 2031 (258,100 males, 269,850 females). This represents a 47 percent increase in the population between 2013 and 2031.

During this same time period the population of Ontario 25 and older is projected to increase by only 26 percent from 9,614,530 (4,661,300 males, 4,953,230 females) in 2013, to 12,064,180 (5,850,820 males, 6,213,360 females) in 2031.

The period from 2011 to 2031 will also see a 54 percent increase in employment in Halton while that of the province will increase by 27 percent. The increased growth in the age groups with high participation rates in boating (i.e. 35 to 44 and 45 to 54) and employment in Halton indicates a likely large increase in the demand for recreational boating activities and a larger share of Ontario's power and sail boaters.

*Projected Growth in Boating Activities:*

Between 2011 and 2030 participation in power boating, sailing, canoeing, kayaking and rowing are all projected to increase. There are no comparable projections available for outrigger canoeing, paddle boating, and stand up paddle boarding, although anecdotal information based on the increased number of members at area clubs suggests that participation in these activities is also in a growth mode.

Over the 20 years between 2011 and 2030 participation in power boating, sailing, canoeing, kayaking and rowing is projected to increase as follows:

<b>Activity</b>	<b>2011</b>	<b>2020</b>	<b>2030</b>
Power Boating	10.8%	13.0%	14.6%
Sailing	3.6%	4.3%	4.8%
Canoeing	6.8%	7.6%	8.3%
Kayaking	2.4%	4.4%	5.4%
Rowing	3.0%	3.1%	3.3%

*Projected Growth in Power and Sail Boats 2013 to 2031:*

Between 2013 and 2031 the number of boats in Ontario is projected to grow as follows:

<b>Length</b>	<b>2013</b>	<b>2023</b>	<b>2031</b>	<b>Percentage Increase</b>
6 m. to <8 m. (20 ft. to <26 ft.)	64,700	71,950	74,230	14.7%
8 m. to <9 m. (26 ft. to <30 ft.)	12,780	14,760	15,440	20.8%
9 m. to <11 m. (30 ft. to <36 ft.)	19,400	29,720	39,010	101.1%
11 m. to <14 m. (36 ft. to <46 ft.)	11,590	16,810	21,120	82.2%
14 m. and longer (46 ft. or more)	6,470	9,980	13,180	103.7%

This projected increased growth in the length of boats will have a particularly strong impact on the facilities in Oakville and Bronte Harbour where there is already a shortage of longer slips and many of the fairways are sub-standard in terms of width. This shortage will be further exacerbated as there will be a need to either modify the number of slips to accommodate wider beam widths or add more slips.

## **Conclusions**

*Need for Seasonal Slips:*

In comparing the number of seasonal slips available in 2013 with the number of boats requiring a slip, it is evident that demand exceeds supply and additional slips are needed. It is estimated that at the end of the boating season in 2013 there was a need for 430 additional slips. By 2018 the need for additional slips will rise to 820; by 2023 to 1,400; by 2028 to 1,860; and reach 2,160 by 2031. By comparison to existing facilities within Halton, this would mean four additional marinas at least the size of Bronte Outer Harbour Marina.

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The trend toward longer and wider boats will have a significant impact on the number of slips in Oakville and Bronte Harbours where the finger docks are short and the fairways narrow. It is evident that there is a current and future need for seasonal slips in the 10.67 metre (35 foot), 12.12 metre (40 foot), and 13.72 metre (45 foot) range.

#### *Need for Transient Slips:*

According to the *2009 Great Lakes Boating Survey*, 60 percent of boater's days away from their home marina are spent within 20 nautical miles. A further 20 percent are spent within 21 and 40 nautical miles, 10 percent within 41 to 60 nautical miles, 6 percent within 61 to 80 nautical miles, and the final 4 percent beyond 80 nautical miles.

During the 2013 boating season, there were 54,190 boaters at the 75 marinas, yacht and power boat clubs within 80 nautical miles of Bronte Harbour. The number of transient boaters visiting the Halton facilities is dependent on the number of boaters within the market and their distance from Halton. Of the 54,190 within 80 nautical miles of Halton, 37,880 were within 20 nautical miles and would have the greatest likelihood of visiting on one or more occasions. The least likely are those 640 boaters within 61 to 80 nautical miles. By 2018 the total number of transient boater days within the overall market area is projected to increase to 59,900; to 65,170 by 2023; to 69,930 by 2028; and reach 72,700 by 2031.

There is clearly an existing and growing transient boater market that the facilities in Halton would be in a position to attract. The Oakville harbour, Bronte harbour and Bronte Outer Harbour Marina are in easy walking distance of the type of shops and restaurants of interest to transient boaters. The numbers provided by the marinas, yacht and power boat clubs within Halton and those within the GTA/Golden Horseshoe Area and beyond confirm there is significant transient boater market to be attracted.

Oakville, Burlington and Halton should increase the number of transient slips available; but should not exceed the industry average of approximately 15 percent of the total slips available. Based on the number of transient boaters attracted to the marinas, yacht and power boat clubs in the GTA/Golden Horseshoe Area, 200 transient slips in Halton Region (i.e.  $1,344 \times 0.15 = 200$ ) could be expected to attract a minimum of 6,000 transient boaters annually.

*Need for Launch Ramps:*

Boats that are trailered to launch ramps are typically less than 8 metres (less than 26 feet). Approximately 20 percent of boats 6 metres to less than 8 metres (i.e. 20 feet to less than 26 feet), and 2 percent of boats 8 metres to less than 9 metres (i.e. 26 feet to less than 30 feet) are trailered to launch ramps on a per use basis. Launch ramp use is usually concentrated during a three-hour launch period (morning) and three-hour retrieval period (afternoon). Launch ramps require a large amount of parking space. Typically a one lane ramp should have at least 35 to 45 vehicle and boat trailer parking spaces. A two lane launch ramp should have between 45 and 75 spaces.

While the Study determined that there is a sizable number of boats in Halton that would likely use a launch ramp, there is little data available to indicate the current level of use, as the two facilities in LaSalle Park in Burlington are free of charge and are not monitored. The Bronte and Oakville launch ramps had 2,200 documented users in 2013. Additional undocumented users frequent the facilities in LaSalle Park and the facilities in Hamilton and Mississauga due to the limited parking at the Burlington, Bronte and Oakville launch ramps. The number of boats likely to use a launch ramp in Halton is projected to increase from 14,300 in 2013; to 15,440 by 2018; to 16,470 by 2023; to 17,370 by 2028; and reach 17,890 by 2031. Ideally, based on the existing data, one additional launch ramp will be required by 2018, two additional launch ramps (for a total of 6) will be required by 2023, and three more by 2031 for a total of seven. However, until more detailed user data is available for the existing launch ramps the study recommends the municipalities concentrate on improving the existing facilities rather than adding additional ones.

It should be noted that the Ministry of Natural Resources considers there is a world class fishery off Bronte/Oakville harbours, especially for salmon fishing. There are currently eight fishing charter boat operators in Oakville and Bronte, and the Ministry feels that the fishery could support at least 12 fishing charter boats. In addition, the 34,100 licensed anglers in Halton spend hundreds of dollars each annually within the Region on fishing and boating equipment.

<b>Purchases Wholly Attributable to Recreational Fishing</b>	<b>Average Annual Expenditure per Active Licensed Angler</b>
Boating Equipment	\$342.54
Fishing Equipment	\$77.21

## Recommendations

### *Monitoring Current Demand Situation:*

In order to provide boating facilities in a timely fashion it will be necessary to monitor the level of demand in an ongoing manner. For marinas this means maintaining a permanent waiting list which indicates the length, width and beam of the boat requiring a slip or mooring. For boating clubs (i.e. canoeing, kayaking, rowing, etc.) it means documenting the number of persons turned away from program offerings or membership categories.

When an individual marina has reached capacity (i.e. 95% occupancy or more) and the marina manager has a documented waiting list approaching one-half the number of seasonal slips, a new or expanded facility is warranted. Given that the environmental, planning and construction steps involved in bringing a new marina to fruition will likely take a minimum of four years (i.e. planning, environmental assessment process and design; approvals by various government agencies; and construction); the waiting list likely will have reached a point where when combined with industry average trade-ups, the new facility will be assured of success as there will be no shortage of demand for slips.

### *Meeting Future Seasonal Slip and Boater Demand:*

The Study clearly indicates that there is a demand for boating facilities much beyond the capacity of the existing facilities. It is also clear that the existing facilities and the three main existing locations cannot meet this demand by gradual expansion. The two river locations at Oakville and Bronte cannot expand further within the existing channel to any degree while respecting environmental objectives. The one location on the open lake in Bronte (i.e. Bronte Outer Harbour Marina) is bound by fixed breakwaters and cannot expand within the footprint of the breakwaters. The La Salle Park Marina is proposing provision of fixed breakwaters which then could accommodate some future expansion. No decision has been made on this location as of the writing of this report.

As the identified demand for slips is beyond the capacity of the existing sites in the Region, new locations will need to be considered on a go forward basis. Selection of any new site will be a complex process that will be subject to an individual environmental assessment process and a thorough review by all levels of government and conservation authorities, as well as the general public. The projections suggest that if the demand were to be met with the typical size marina found on the Great Lakes, it would require the construction of four facilities at least as large as Bronte Outer Harbour Marina along the Halton waterfront by 2031.

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Clearly, this is a task that will call for extensive public consultations, creativity, and out of box thinking.

In addition, the Burloak Canoe Club requires an additional 70 to 75 feet of shoreline dockage for a total of 100 feet to meet current demand, let alone future demand. Additional space and secured parking for people with disabilities would allow the Wai Nui O Kanaka Outrigger Canoe Club to expand its membership as well.

### Public Consultation

As part of the Phase 1 of the Feasibility and Capacity Study, the consultant (Touristics) undertook significant public consultation to ensure they had the correct data, future needs and opinions of various stakeholders across Halton as well as within the boating industry.

Touristics developed an inventory database they issued to all boat clubs across Halton and met/interviewed with the Commodores and executives of all boat and yacht, sailing, canoe clubs. They also met/interviewed AOHS (Association of Harbour Stakeholders) to receive their comments and opinions on the need and future of recreational boating. A public meeting was held on December 7, 2013 where Touristics provided high level results of their study. Approximately 100 people from across Halton Region attended the meeting.

From the work undertaken to date through the Feasibility and Capacity Study, it is clear there is a future demand for recreational boat slips in the short and long term within Halton Region. Recreational boating, and the size of boats will continue to increase in the future. There is going to be an increasing need for transient moorings which at present are not very well served as well as an increase in launch ramps across Halton.

With an understanding that demand will increase in the short and long term across Halton it is appropriate to continue with Phase 2 of the Harbours Feasibility and Capacity Study.

### **CONSIDERATIONS:**

#### **(A) PUBLIC**

Through the study boat, yacht and sailing clubs have been contacted to provide information and feedback on the study. A public meeting was held to present the study recommendations to the attendees. Major stakeholders such as AOHS (Association of Oakville Harbour Stakeholders) were also contacted for discussion. Updates on the Study have also been provided at

the Regional Waterfront Parks Advisory Committee as the Region is a Study partner.

**(B) FINANCIAL**

There are no financial implications associated with this report.

**(C) IMPACT ON OTHER DEPARTMENTS & USERS**

N/A

**(D) CORPORATE AND/OR DEPARTMENT STRATEGIC GOALS**

This report addresses the corporate strategic goal to:

- be accountable in everything we do

**(E) COMMUNITY SUSTAINABILITY**

As a waterfront community with two (2) recreational harbours, it is important to understand the short and long term requirements for marina, mooring facilities within Oakville, but also Halton Region. Oakville has a desire to ensure our harbours remain viable, vibrant and prime assets of the community for our residents and visitors.

**APPENDICES:**

Appendix A – Recreational Boating Feasibility and Capacity Study–Phase 1-  
Final Report

Submitted and Prepared by:  
Chris Mark  
Director, Parks and Open Space