Recreational Boating Feasibility and Capacity Study
Recreational Boating Feasibility and Capacity Study

- TOURISTICS + Shoreplan Engineering Limited were retained by:
  - Town of Oakville;
  - City of Burlington; and
  - Regional Municipality of Halton.

Note: Throughout the presentation boat lengths are identified in feet as this is a common reference in the boating industry.
Recreational Boating Feasibility and Capacity Study

Objectives of Study:

• Comprehensive analysis of current harbour and recreational boating facilities capacity within the Greater Toronto Area (GTA)/ Golden Horseshoe Region and specifically within Region of Halton;

• Assess changing demographic profile of area and impacts on demand for recreational boating;

• Identify trends in type of boating and docking requirements; and

• Determine if additional harbour and recreational boating facilities capacity is warranted within Halton Region.
Recreational Boating Feasibility and Capacity Study

- Study to look at next 20 year period (i.e. 2013 to 2033)

- Steps in Study:
  - Review of all harbours and recreational boating facilities within Halton Region;
  - Document and map existing capacity and features of current Halton Region boating facilities;
  - Analyze the Strengths, Weaknesses, Opportunities and Threats (SWOT) throughout Halton Region; and
  - Review of all marina’s and yacht club’s facilities within GTA/Golden Horseshoe Region.
Recreational Boating Feasibility and Capacity Study

- **Study Process:**
  - Determine current and projected future demand for seasonal and transient (visitor) slips;
  - Conduct a comprehensive rates and fees analysis; and
  - Develop a methodology to review and evaluate options in meeting future boating demand.
Recreational Boating Feasibility and Capacity Study

- Profile of the boating community (power and sail) in Ontario:
  - There are close to 1.6 million power and sail boaters in Ontario;
  - Power and sail boating appeals to males and females of all ages; and
  - Greatest number of power and sail boaters are in the 35 to 54 age group.
Recreational Boating Feasibility and Capacity Study

- Profile of the boating community (power and sail) in Ontario (con’t):
  - Power and sail boaters are represented in all levels of attained education;
  - One half of Ontario’s power and sail boaters are employed in professional, administrative and managerial positions; and
  - Boaters are middle class, the largest number of power and sail boaters come from households earning $40,000 to $74,999.
Recreational Boating Feasibility and Capacity Study

• Participation in All Types of Boating
  
  • Participation in all types of boating activity is growing;
  
  • Participation in power and sail boating is projected to increase from 14.5% in 2011 to 17.4% by 2020 and 19.6% by 2030;
  
  • Canoeing is projected to increase from 6.8% in 2020 to 8.3% in 2030; and
  
  • More boating facilities will likely be required to support this growth.
Recreational Boating Feasibility and Capacity Study

• Marinas & Yacht Clubs
  • In Halton Region there are:
    • 7 marinas, yacht and boating clubs:
      - with 1,445 seasonal slips/moorings (96.8%* occupied)
      - 430 on waiting list for a slip; and
    • 4 boating clubs not requiring slips or moorings (i.e. canoes, kayaks).
  • GTA/Golden Horseshoe Region
    • 41 marinas, yacht and boating clubs
      - with 9,169 seasonal slips/moorings (98.6% occupied)
      - 1,450 on waiting list for a slip

Special Notes:

❖ Slips not occupied are due maintenance issues, depth of water, not suitable for length of boat, etc.

❖ anything over 95% is considered full capacity
Recreational Boating Feasibility and Capacity Study

- Growth in Length of Ontario Boats:
  - Not only has the number of boats requiring slips or moorings increased;
  - The length of boats particularly those over 30 feet has grown the most;
  - Marinas & Yacht Clubs require more longer finger docks; and
  - Size of the fairway (turning area) is however reduced.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>20 ft. to &lt;26 ft.</td>
<td>58,019</td>
<td>59,392</td>
<td>60,823</td>
<td>62,284</td>
<td>63,033</td>
<td>63,796</td>
<td>9.9%</td>
</tr>
<tr>
<td>26 ft. to &lt;30 ft.</td>
<td>11,208</td>
<td>11,443</td>
<td>11,720</td>
<td>12,010</td>
<td>12,283</td>
<td>12,556</td>
<td>12.0%</td>
</tr>
<tr>
<td>30 ft. to &lt;36 ft.</td>
<td>14,365</td>
<td>15,295</td>
<td>16,145</td>
<td>16,819</td>
<td>17,622</td>
<td>18,525</td>
<td>28.9%</td>
</tr>
<tr>
<td>36 ft. to &lt;46 ft.</td>
<td>8,869</td>
<td>9,394</td>
<td>9,843</td>
<td>10,206</td>
<td>10,682</td>
<td>11,129</td>
<td>25.5%</td>
</tr>
<tr>
<td>46 ft &amp; over</td>
<td>4,775</td>
<td>5,114</td>
<td>5,335</td>
<td>5,580</td>
<td>5,874</td>
<td>6,178</td>
<td>29.4%</td>
</tr>
<tr>
<td>Total</td>
<td>97,236</td>
<td>100,638</td>
<td>103,866</td>
<td>106,899</td>
<td>109,494</td>
<td>112,184</td>
<td>15.4%</td>
</tr>
</tbody>
</table>
Recreational Boating Feasibility and Capacity Study

• Growth in Beam (Width) of Ontario Boats:
  • The beam (width) of boats is increasing as the length grows;
  • Marinas & Yacht Clubs require more space between finger docks;
  • Fewer boats can be accommodated within the existing marina or yacht basin; and
  • With more space required between finger docks, either the number of boats that can be accommodated will be reduced or the size of the marina or yacht club basin will have to be increased.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 6.5 ft.</td>
<td>45,973</td>
<td>47,453</td>
<td>48,876</td>
<td>50,229</td>
<td>51,281</td>
<td>52,367</td>
<td>13.9%</td>
</tr>
<tr>
<td>6.5 ft. to &lt;10 ft.</td>
<td>49,007</td>
<td>50,720</td>
<td>52,337</td>
<td>53,836</td>
<td>55,183</td>
<td>56,576</td>
<td>15.4%</td>
</tr>
<tr>
<td>10 ft. to &lt;13 ft.</td>
<td>1,512</td>
<td>1,650</td>
<td>1,779</td>
<td>1,898</td>
<td>2,029</td>
<td>2,170</td>
<td>43.5%</td>
</tr>
<tr>
<td>13 ft. &amp; wider</td>
<td>744</td>
<td>815</td>
<td>874</td>
<td>936</td>
<td>1,001</td>
<td>1,072</td>
<td>44.1%</td>
</tr>
<tr>
<td>Total</td>
<td>97,236</td>
<td>100,638</td>
<td>103,866</td>
<td>106,899</td>
<td>109,494</td>
<td>112,184</td>
<td>15.4%</td>
</tr>
</tbody>
</table>
Projected Growth in Length of Ontario Boats:

- Boats 20 to 26 feet in length will continue to dominate the boating market;
- The number of boats 30 to 36 feet and 36 to 46 feet in length will than double in the next 20 years;
- The number of boats 46 feet and longer will more than double in the next 20 years; and
- Marinas and yacht clubs will need to provide more finger docks 30 feet and more in length.
Recreational Boating Feasibility and Capacity Study

- Projected Growth in Beam (Width) of Ontario Boats:
  - The number of boats under 6.5 feet wide will increase by 30% in the next 20 years;
  - The number of boats 6.5 feet to 10 feet wide will increase by 50%;
  - The number of boats 10 feet or more in width will more than double; and
  - Marinas and yacht clubs will have to provide more space between finger docks.
Recreational Boating Feasibility and Capacity Study

- Projected Growth in Halton Region’s Population:
  - Between 2013 and 2033 Halton Region’s population is projected to grow faster than the province’s;
  - The population 25 and over will increase by 53%;
  - From 359,130 in 2013 to 549,420 by 2033; and
  - Demand for recreational boating facilities will increase accordingly.
Recreational Boating Feasibility and Capacity Study

- Projected Growth of Halton Region’s Share of Ontario’s Power and Sail Boaters:
  - Halton’s projected population growth between 2013 and 2031 will exceed the average for the Province;
  - Halton Region will have an increasingly larger share of Ontario’s power and sail boaters;
  - Increases in demand for slips or moorings in Halton Region will be greater than the provincial average; and
  - Given the current number of slips or moorings in Halton Region, demand will significantly exceed supply.
Recreational Boating Feasibility and Capacity Study

• Projected Growth in the Number of Power and Sail Boaters in Halton Region:
  • The number of male power & sail boaters will grow by 50% over next 20 years;
  • The number of female power & sail boaters will grow by 38% over next 20 years; and
  • To accommodate the increased number of power and sail boaters additional slips or moorings will be required.

![Graph showing projected growth in the number of power and sail boaters by gender and age group from 2013 to 2033.](image-url)
Recreational Boating Feasibility and Capacity Study

- Estimated Number of Power and Sail Boats in Halton Region:
  - Data on the number of boats is only available at the provincial level;
  - We have used the industry accepted method to arrive at the number of boats at the County and/or Regional municipality level;
  - Using this method likely underestimates the number of boats in areas on the Great Lakes (i.e. Halton Region) and overestimates those that are land-locked (i.e. Kitchener-Waterloo); and
  - Dividing the population of Halton Region by the number of persons per boat in Ontario, we arrive at an estimate of the number of boats in the Region.

<table>
<thead>
<tr>
<th>Year</th>
<th>Population</th>
<th>Number of Boats 20 feet and over</th>
<th>Number of Persons Per Boat</th>
<th>Population</th>
<th>Number of Boats 20 feet and over</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>13,505,900</td>
<td>112,184</td>
<td>120.4</td>
<td>516,160</td>
<td>4,287</td>
</tr>
<tr>
<td>2013</td>
<td>13,632,430</td>
<td>114,940</td>
<td>118.6</td>
<td>525,260</td>
<td>4,430</td>
</tr>
<tr>
<td>2018</td>
<td>14,334,400</td>
<td>129,540</td>
<td>110.7</td>
<td>582,890</td>
<td>5,270</td>
</tr>
<tr>
<td>2023</td>
<td>15,155,830</td>
<td>143,220</td>
<td>105.8</td>
<td>645,820</td>
<td>6,100</td>
</tr>
<tr>
<td>2028</td>
<td>16,018,950</td>
<td>155,680</td>
<td>102.9</td>
<td>711,380</td>
<td>6,910</td>
</tr>
<tr>
<td>2033</td>
<td>16,870,730</td>
<td>168,170</td>
<td>100.3</td>
<td>782,020</td>
<td>7,790</td>
</tr>
</tbody>
</table>
Recreational Boating Feasibility and Capacity Study

- Estimated Demand for Seasonal Slips in Halton Region (2012 to 2033):
  - There are 1,445 slips or moorings currently available;
  - 1,400 slips are currently occupied;
  - In 2012 there were 4,287 boats 20 feet or longer in the Region;
  - If all these boats were to be accommodated at a marina or yacht club there would have been a need for 2,842 additional slips or moorings; and
  - This need is expected to increase to 4,530 by 2023 and 6,220 by 2033.

<table>
<thead>
<tr>
<th>Year</th>
<th>Number of Seasonal Slips at Marinas &amp; Yacht Clubs</th>
<th>Number of Slips Occupied</th>
<th>Number of Boats 20 feet and over Requiring a Slip</th>
<th>Number of Additional Slips Required</th>
<th>Number of Boats 20 feet and over Requiring a Slip</th>
<th>Number of Additional Slips Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>1,445</td>
<td>1,405</td>
<td>4,287</td>
<td>2,842</td>
<td>2,201</td>
<td>756</td>
</tr>
<tr>
<td>2013</td>
<td>1,445</td>
<td>1,399</td>
<td>4,430</td>
<td>2,980</td>
<td>2,280</td>
<td>830</td>
</tr>
<tr>
<td>2018</td>
<td>1,565</td>
<td>1,540</td>
<td>5,270</td>
<td>3,700</td>
<td>2,580</td>
<td>1,010</td>
</tr>
<tr>
<td>2023</td>
<td>1,565</td>
<td>1,565</td>
<td>6,100</td>
<td>4,530</td>
<td>3,060</td>
<td>1,490</td>
</tr>
<tr>
<td>2028</td>
<td>1,565</td>
<td>1,565</td>
<td>6,910</td>
<td>5,340</td>
<td>3,540</td>
<td>1,970</td>
</tr>
<tr>
<td>2033</td>
<td>1,565</td>
<td>1,565</td>
<td>7,790</td>
<td>6,220</td>
<td>4,060</td>
<td>2,490</td>
</tr>
</tbody>
</table>
Recreational Boating Feasibility and Capacity Study

- Estimated demand for seasonal slips in Halton Region (2012 to 2033):
  - 20% of boats 20 to 26 feet are trailered to a launch ramp each time they are used;
  - 5% of boats 26 to 30 feet are trailered to a launch ramp each time they are used;
  - 5% of all households in Halton Region on Lake Ontario have a dock or boathouse;
  - This 5% does not require a slip or mooring in a marina or at a yacht club;
  - With this adjustment there were 2,201 boats requiring a slip or mooring in 2012;
  - If the additional 5% were to be accommodated at a marina or yacht club there would have been a need for 756 additional slips or moorings; and
  - The need for additional slips increases to 1,490 by 2023 and 2,490 by 2033.

<table>
<thead>
<tr>
<th>Year</th>
<th>Number of Seasonal Slips at Marinas &amp; Yacht Clubs</th>
<th>Number of Slips Occupied</th>
<th>Number of Boats 20 feet and over Requiring a Slip</th>
<th>Number of Additional Slips Required</th>
<th>Number of Boats 20 feet and over Requiring a Slip</th>
<th>Number of Additional Slips Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>1,445</td>
<td>1,405</td>
<td>4,287</td>
<td>2,842</td>
<td>2,201</td>
<td>756</td>
</tr>
<tr>
<td>2013</td>
<td>1,445</td>
<td>1,399</td>
<td>4,430</td>
<td>2,980</td>
<td>2,580</td>
<td>830</td>
</tr>
<tr>
<td>2018</td>
<td>1,565</td>
<td>1,540</td>
<td>5,270</td>
<td>3,700</td>
<td>2,750</td>
<td>1,010</td>
</tr>
<tr>
<td>2023</td>
<td>1,565</td>
<td>1,565</td>
<td>6,100</td>
<td>4,530</td>
<td>3,060</td>
<td>1,490</td>
</tr>
<tr>
<td>2028</td>
<td>1,565</td>
<td>1,565</td>
<td>6,910</td>
<td>5,340</td>
<td>3,540</td>
<td>1,970</td>
</tr>
<tr>
<td>2033</td>
<td>1,565</td>
<td>1,565</td>
<td>7,790</td>
<td>6,220</td>
<td>4,060</td>
<td>2,490</td>
</tr>
</tbody>
</table>
Recreational Boating Feasibility and Capacity Study

Next Steps:

- Complete the SWOT analysis of boating facilities throughout Halton Region;
- Document and map location and capacity of recreational boating facilities;
- Determine the capability of the existing facilities to meet the anticipated increase in demand;
- Develop a methodology to review and evaluate options in meeting future boater demand; and
- Undertake the second Phase of this study investigating and analyzing potential harbour locations within Halton Region.
Recreational Boating Feasibility and Capacity Study

Thank you