



Economic Development and Planning Committee

Tuesday, June 5, 2018, 4:15 pm
City Hall, Council Chambers

Committee Members

Councillor M. Kalivas,
Chair
Councillor J. Baker
Councillor L. Bursey
Councillor D. LeSueur
Mayor D. Henderson,
Ex-Officio

Areas of Responsibility

Economic Development
Planning
Chamber of Commerce
DBIA
Heritage Brockville

Page

COMMITTEE AGENDA

Disclosure of Interest

Delegations and Presentations

Nil.

Correspondence

Nil.

Reports from Boards and Committees

- 3 1. Brockville Public Library
 Emily Farrell, CEO

Staff Reports

- 9 - 57 1. 2018-066-06
 Marina Market Needs Analysis

THAT the Economic Development and Planning Committee receive for information the Marina Market Needs Analysis report; and

THAT the findings of the report form part of the Waterfront Adhoc Committee's community consultation on waterfront development initiatives.

Economic Development and Planning Committee
June 5, 2018

New Business - Reports from Members of Council

Nil.

Consent Agenda

Adjournment

THAT the Economic Development and Planning Committee adjourned its meeting until the next regular meeting scheduled for July 3, 2018.



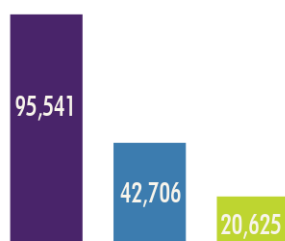
Brockville Public Library

engage | evolve | experience

2017 Annual Report

Quick Facts

Items borrowed 2017



■ Print materials ■ A/V ■ eTitles

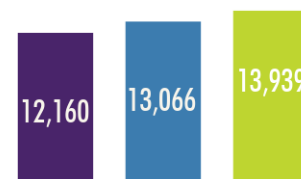
Library visits 2017



■ In-person (124,548 people)

■ Online (website & catalogue) (123,462 people)

Number of library cardholders



■ 2015 ■ 2016 ■ 2017

2017 Highlights



Fruits & Veggie program

This summer kids in the community learned about healthy eating and gained gardening skills when we opened the Library's community garden. We will be continuing this program next summer with additional garden beds!



Experience Collection

This summer we launched our Experience Collection and are now lending fishing rods, geocaching kits and MAPsacks. Stay tuned for more additions in 2018!



New Children's Section

On Family Day 2017 the Library opened its new and updated children's section. Thanks to the City of Brockville and the Rotary Club for making this possible!



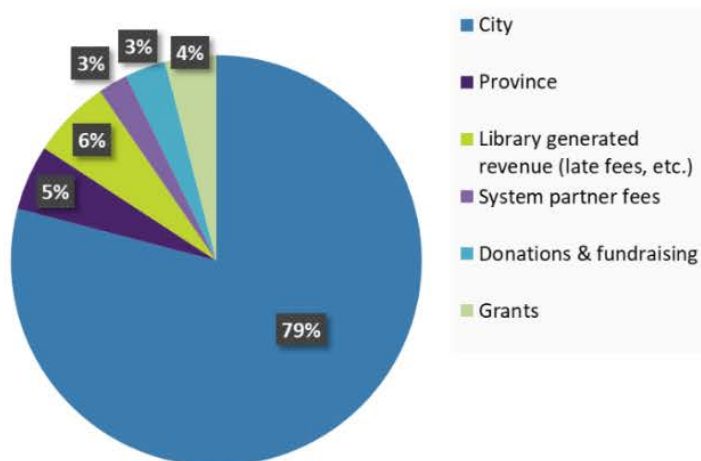
Virtual Reality

In October we launched our new Oculus Rift Virtual Reality (VR) system. Customers can now visit the ocean floor, ride a roller coaster or go rock climbing within the Library's virtual world.

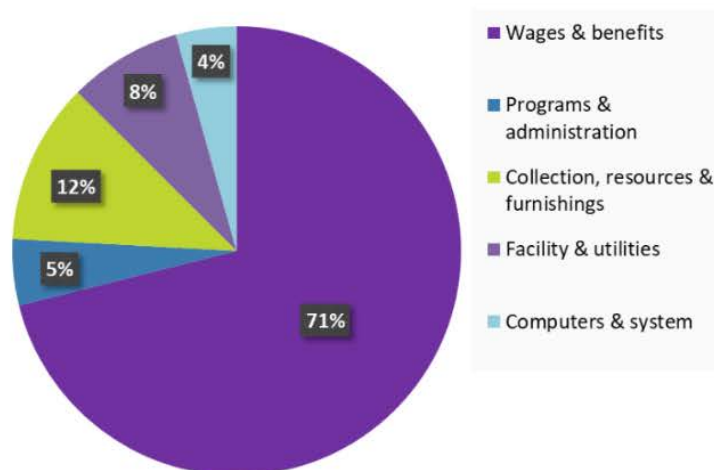
Stop by the Library to book your tutorial!

2017 Finances*

Where your money comes from



Where your money goes



*based on unaudited financial statements

2017 Community Partners



The Ross W. McNeil
Foundation



**EMPLOYMENT +
EDUCATION CENTRE**
building successes



**BROCKVILLE
PRIDE**

Brockville Mental
Health Centre



Brockville 50+
Activity Centre



To all of our supporters this year....
Thank you!

Contact Us

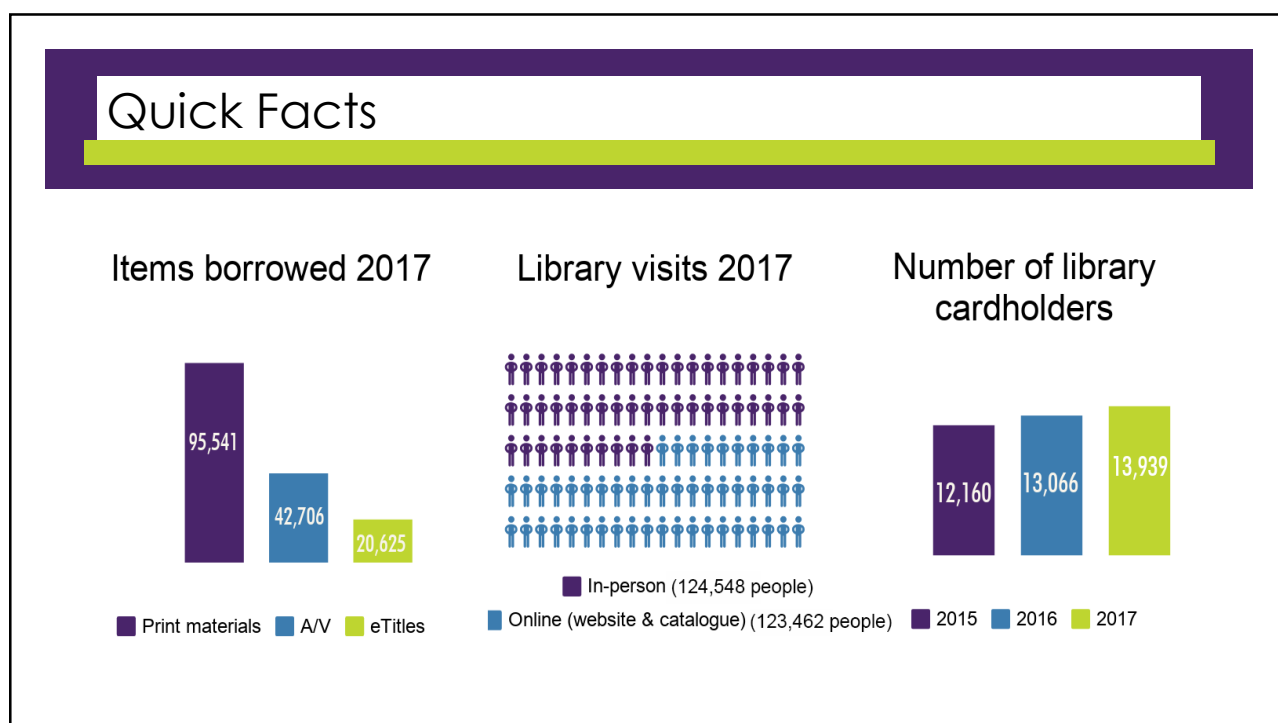
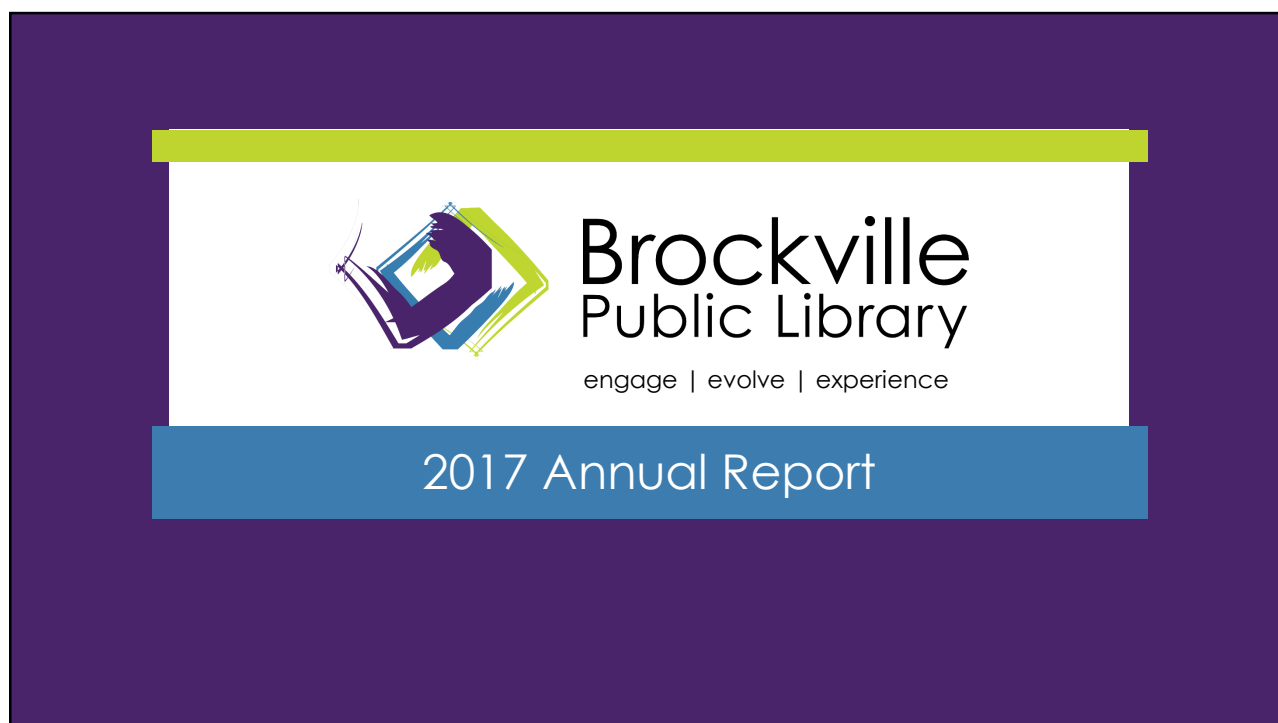
23 Buell St, Brockville
613-342-3936
info@brockvillelibrary.ca

www.brockvillelibrary.ca
www.facebook.com/BrockvillePublicLibrary
www.twitter.com/BrockvillePL

Library Hours

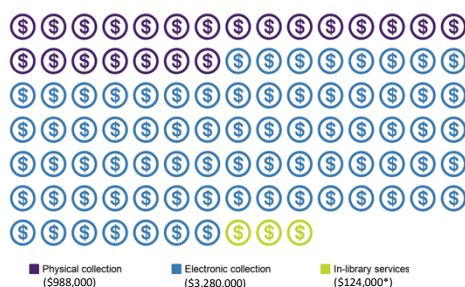
Mon	9am - 1pm
Tues, Wed, Thurs	9am - 8pm
Fri, Sat	9am - 5pm
Sun	1pm - 5pm*

*Closed Sundays of long weekends



Quick Facts

Value of Library Resources



The Library provided over \$4.3 million* worth of services to the community in 2017 –that's **almost \$200 per resident**

*In-library estimates include cost of computers/ technology not lent (not including cost of microfilm reader), cost to conduct programs (approx. 1 hr + ½ hr to prepare and clean up + \$20 in supplies for each program – a modest estimate for staff time), value of staff expertise (approx. 1 min of staff time per in-library visit X 124,548 visits in 2017 = 2,075.8 hrs or 86.5 days of staff time to providing expertise to the public – a modest estimate), non-circulating materials (includes local history and microfilm collection), free community space (based on number of days open per year and lowest cost for one Library meeting room booking). DOES NOT INCLUDE: costs to operate building and majority of staff time and expertise that add value to the library experience.

Looking to the Future

- New Council & Library Board term: current Library Board and CEO are already beginning preparations to recruit and transition possible new Board members.
- Library Strategic Plan 2019 – 2024: we are wrapping up our current Strategic Plan and beginning the preparations for our new plan. Stay tuned as the Library will be seeking community input.

Questions?

Brockville Public Library
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2017 Annual Report

The images and graphics in our 2017 Annual Report help to tell part of the story for the Brockville Public Library (BPL). The evidence confirms increased use of the Library resources, experiences and services whether they are provided within the Buell Street building, in a community location or virtually through the online access. These improvements are the result of the coordinated efforts from many people and supporting organizations.

The City of Brockville provides a significant portion of the operating budget through tax-based funding. The building is owned and maintained by the City and several recent facility upgrades have helped to ensure a welcoming and safe space for customers. The Library is a critical asset for Brockville and a cornerstone of a healthy community.

Working within the framework of our Strategic Plan 2013 – 2018, BPL staff have planned for facility upgrades and renovations as funds are available. The changes thus far have promoted accessibility and flexibility to accommodate a variety of individual, group work and program offerings. The BPL staff are recognized for their innovative programs, connections with community organizations and service to customers. You are likely to be welcomed by them in the library, in a community location or even on a trail leading young explorers.

BPL is part of a consortium of local libraries who are working together to ensure efficiencies and collaborative development of practices to meet the changing needs of our communities and customers. BPL actively serves people of all ages, interests, and abilities thus providing a cornerstone for a healthy community. Volunteers with a wide range of interests, and talents to share are active and essential in the library's success and delivery of service.

As noted in the 2017 Annual Report, the Library is fortunate to have the enthusiastic support and encouragement from several partners and community groups who provide funding and/or program support. The Library is increasingly dependent upon donations and grants to provide quality services, programs and up-to-date resources. We are thankful to our donors for their support; donations of any size are welcomed and make a difference within this community.

We are fortunate to have an active and supportive *Friends of the Brockville Public Library* group, who actively promotes literacy and local authors. Their renowned bake and treasure sales provide funds for some of the furnishings and program supports, which further enhance the experience of a library visit.

In 2018, we are reviewing our current Strategic Plan, celebrating the accomplishments and identifying the areas still requiring attention. We look forward to refreshing our focus and priorities for action; actions that will meet the needs of our community.

Nancy Bowman, Chair Brockville Public Library

May 29, 2018

REPORT TO ECONOMIC DEVELOPMENT AND PLANNING COMMITTEE – JUNE 5, 2108

**2018-066-06
MARINA MARKET NEEDS ANALYSIS**

**R NOLAN
DIRECTOR OF ECONOMIC
DEVELOPMENT**

RECOMMENDATION

THAT the Economic Development and Planning committee receive for information the Marina Market Needs Analysis report; and

THAT the findings of the report form part of the Waterfront Adhoc Committee's community consultation on waterfront development initiatives.

PURPOSE

To request Committee to receive the report for information and for the report's findings to be referred to the Waterfront Adhoc Committee for inclusion in their community consultation.

BACKGROUND

In the past number of years there has been a number of marina's (Ivy Lea, Gananoque, Quinte West) along the St Lawrence and 1000 Islands expanding their operations, and at the same time there has been anecdotal evidence of boaters bypassing Brockville, either due to capacity or inappropriate berth size.

The City's waterfront Official Plan objectives identified in the 2006 and 2009 reports include:

- To increase capacity for transient guest boating and recreational needs of this market with focus on Quebec/Northern New York
- To provide the platform for investment attraction targeted at complementary boaters and tourist services
- To increase employment in the tourism and recreational sectors
- To utilize innovative mooring designs to address issues associated with breakwater challenges and limit impact of wave action on boat berthing
- To identify innovative financing options for the capital infrastructure and a plan for investment attraction and financing

In 2016 the City applied for provincial funding under the Tourism Development Fund to conduct a marina market needs analysis of the City of Brockville municipal marina.

The objectives of the report were to:

- Assess and validate the market demand for boating traffic along the St Lawrence
- To define the supply of marina services in Brockville and along the St Lawrence
- To assess the existing Brockville Municipal Marina services in terms of services for boaters and to identify marketing opportunities
- To recommend options for expanding the city's marina operations to accommodate future growth and assess their financial operations
- To identify financing options for capital

In completing the report the consultants undertook the following:

- Reviewed relevant city documents, such as Community Strategic Plan, Waterfront Master Plan and Urban Design Strategy
- Compiled an inventory of marina operations and services;
- Conducted a survey of other marina operators along the St Lawrence;
- Conducted interviews with 16 local stakeholders, including all local marina operators

ANALYSIS

The report had a number of key findings, specifically:

- The Brockville Municipal Marina has generated a net profit for the City of Brockville over the last 8 years of its operation, although this profit has declined significantly in the last few years, to the point where it is now essentially a break-even operation.
- The marina operation does generate net economic benefit to the community. This is primarily from transient boaters' expenditures in the City for supplies, restaurant meals, etc. The analysis undertaken in the report suggests that there is considerable scope to increase this return.
- The boating market is growing at an average rate of 1% to 3% per year. The survey of operators revealed that some smaller operations were static or even losing market share while others were growing significantly. Recent expansions of marina operations in Quinte West, were in response to growth in the market, and some marinas in the survey indicated an intention to expand operations in light of demand growth.
- Demand projections for an expanded Brockville Municipal Marina operation over a 10-year period using the 1% and 3% growth rates were developed. The projections for a marina in terms of the number of slips demanded in 10 years' time ranged from 128 to 286 (note that the current provision of slips is 99).

- Two physical scenarios to accommodate this growth were examined: (A) Improvement of the existing Brockville Municipal Marina with construction of new secondary facility east of Blockhouse Island, (B) Brockville Municipal Marina as transient-only boater destination.
- A new and repositioned marina operation has the potential to be profitable: A high-level analysis was undertaken that suggests that a repositioned marina operation has potential to incur a small loss or make a modest profit. This needs to be further assessed in a more detailed business plan once a specific scenario has been selected.
- There is a need for the City of Brockville to more aggressively market and promote the City as a key boating destination: The City must be promoted to the boating community as a 'must see' destination, as well as providing a waterfront and marina that are easy to navigate and access. It is recommended that more packaging of the Brockville experience for the boater be undertaken as well as more active marketing and promotion.
- The positive economic impact associated with these marina development initiatives can be significant: The economic impact associated with additional boating traffic and resulting expenditure in the City is estimated to be between \$403,000 and \$504,000 at the end of 10 years' time (as measured in \$2018). This is considerably more than the current level of approximately \$150,000.

The Report makes six (6) recommendations

1. Collect more rigorous baseline data from the Brockville Municipal Marina for both transient as well as seasonal boaters. (end of 2019)
2. Work with the BIA and other key waterfront partners (e.g. the Aquatarium) to create a product development and marketing strategy specifically aimed at the transient boater market. (end of 2019)
3. Undertake communications (possibly through a survey) with existing seasonal slip owners at the municipal marina to apprise them of the investigations into relocation of the seasonal operation and solicit their input to the planning process. (2020 – 2022)
4. Similarly, undertake communications with waterfront businesses and other users of the waterfront to apprise them of the investigations into relocation of the seasonal operation and solicit their input to the planning process. (2020 – 2022)
5. Develop a more detailed and specific business plan for the new marina operation. (2020 – 2022)
6. Undertake a more detailed design study regarding the development of a seasonal marina operation at St. Lawrence Park and a redevelopment / refurbishment of the slips in Tunnel Bay. (2023 and beyond)

FINANCIAL CONSIDERATION

There are no financial considerations from this report.

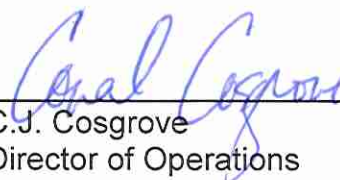


R. Nolan
Director of Economic Development



D. Dick, CA, CPA
Director of Corporate Services

B. Casselman
City Manager

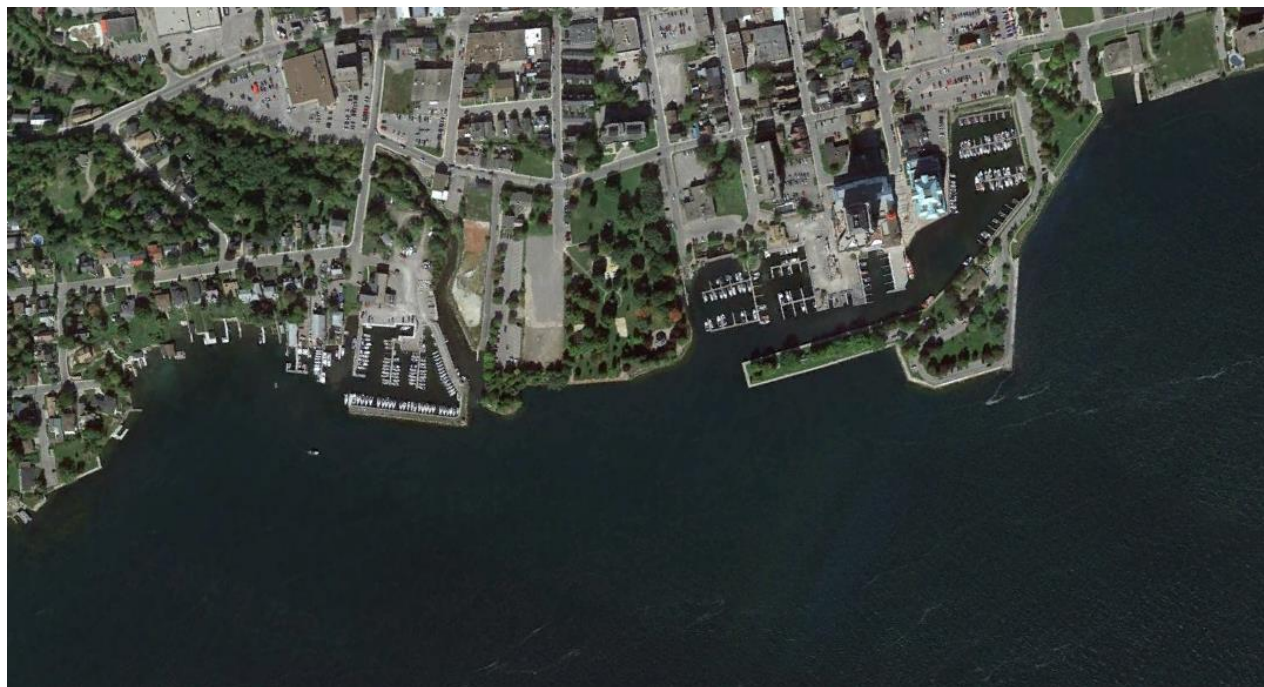


C.J. Cosgrove
Director of Operations



City of Brockville

Marina Market Demand Study Final Report



April 2018



Funding Provided by the Government of Ontario



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Executive Summary

The following are the key points relating to the market for an expanded marina operation in Brockville:

1. **The Brockville Municipal Marina historically has generated a modest profit for the municipality:** The financial analysis shows that the Brockville Municipal Marina has generated a net profit for the City of Brockville over the last 8 years of its operation, although this profit has declined significantly in the last few years, to the point where it is now essentially a break-even operation.
2. **The marina generates a positive economic impact in the community:** In addition to consistently generating a profit since 2010, there is evidence that the marina operation does generate net economic benefit to the community. This is primarily from transient boaters' expenditures in the City for supplies, restaurant meals, etc. Thus, the current operation represents a positive 'return on investment' to the City. The analysis undertaken in the report suggest that there is considerable scope to increase this return.
3. **Recreational boating is a growing market:** A survey of marina operators in the Kingston-to-Cornwall corridor), plus a review of the available literature, suggests that on average the boating market (expressed in terms of demand for both transient and seasonal boater slips) is growing at an average rate of 1% to 3% per year. While the survey revealed that some smaller operations were static or even losing market share (as demonstrated by diminishing demand for slips) others were growing significantly, so that on average the overall market growth was seen to be within this range. (In fact, recent expansions of marina operations have occurred in Quinte West, responding to growth in the market, and some marinas in the survey indicated an intention to expand operations in light of demand growth.)
4. **Demand projection in Brockville has the potential to increase its market share of boating demand:** A demand projection was developed for an expanded Brockville Municipal Marina operation over a 10-year period. First of all, a 'low end' and a 'high end' projection for overall demand throughout the market area was developed, looking at a 1% and 3% growth rate respectively. Then three scenarios relating to the amount of this demand that the Brockville Marina might be able to capture were developed, ranging from a continuation of its current market share of about 1.8% to a more aggressive market penetration rate of 3% which assumed that Brockville was able to position itself as a major boating destination on the St. Lawrence, optimally located between Kingston and Cornwall. The projections for a marina in terms of the number of slips demanded in 10 years' time ranged from 128 to 286, depending upon the specific scenario examined (note that the current provision of slips is 99).

5. **Two physical scenarios to accommodate this growth were examined:** Two physical design scenarios were examined at a very high level (note that this was not a design study); these are summarized below:

Scenario	Details	Advantages	Disadvantages
A) A) Improvement of Existing Brockville Municipal Marina with construction of new Secondary Facility East of Blockhouse Island	<ul style="list-style-type: none"> - Basic improvements to existing dockage put in place - Channel or culvert widened across Blockhouse Island to improve flow through the area and thus improve water quality 	<ul style="list-style-type: none"> - Would utilize existing infrastructure in Tunnel Bay and build only for anticipated growth - Actual construction (and related expense) could be put off until demonstrable increase in demand was seen (as a result of marketing improvements) 	<ul style="list-style-type: none"> - Immediate improvements to Tunnel Bay would likely only be a temporary solution for a few years (depending upon growth rate of demand) unless capacity utilization could be increased significantly)
B) Brockville Municipal Marina as Transient-Only Boater Destination	<ul style="list-style-type: none"> - Relocate all seasonal dockage to St. Lawrence Park - Focus on Tunnel Bay as the transient dockage location, located adjacent to the downtown 	<ul style="list-style-type: none"> - 'Prime' dockage locations near the downtown would be reserved for transient boaters (who will have the highest expenditure in the community) - Seasonal docking in out from the DFO remittance area so municipality will be able to keep all revenues generated – a much more profitable operation - Would provide plenty of room for future growth 	<ul style="list-style-type: none"> - Would imply that the marina management structure would need to manage two operations (i.e. in two locations) - On the other hand, given that the City already operates a campground facility at St. Lawrence Park, there may be some operational synergies realized - Requires solution for existing diving operations

6. **A new and repositioned marina operation has the potential to be profitable:** As with the capital cost question, it was not a central purpose of this study to estimate the operating costs and revenues, and resulting profitability, of the repositioned marina offering. However, a high-level analysis was undertaken. Depending upon the market demand scenario, and the physical design configuration selected, the range of revenues for the various options was seen to be as follows:

	Low End	Mid-Point	High End
Range of Revenues	\$310,000	\$493,000	\$676,000
Range of Costs	\$376,000	\$403,000	\$429,000
Net Income	(\$66,000)	\$90,000	\$247,000

Clearly, depending upon the specific scenario examined, a repositioned marina operation has potential to incur a small loss or make a modest profit. This needs to be further assessed in a more detailed business plan once a specific scenario has been selected.

7. All options assume a much more aggressive stance undertaken by the City of Brockville to aggressively market and promote the City as a key boating destination:

The City must be promoted to the boating community as a 'must see' destination, as well as providing a waterfront and marina that are easy to navigate and access. It is recommended that more packaging of the Brockville experience for the boater be undertaken as well as more active marketing and promotion. The kinds of initiatives that should be considered include:

Product Development	Marketing Messages
<ul style="list-style-type: none"> - Shuttle bus or trolley from the marina to downtown - Tours of the Tunnel, Aquatarium, etc. - Possibly organized family activities - Possibly evening fireworks - Free bicycle uses (like Cobourg) - Concerts in the park - Easy docking – valet service - Concierge service in French, possibly other languages as well 	<ul style="list-style-type: none"> - Less than a days' sail from any point in the Kingston – Cornwall corridor - One of the most interesting and historic communities along the St. Lawrence - Lots to do for the entire family: educational and entertaining - Discount coupon book for downtown shops & restaurants - Promote easy docking - Utilization of full range of marina apps (e.g. Dockwa) to facilitate booking and promote the City (explore possibility of Brockville-specific app)

8. The positive economic impact associated with these marina development initiatives can be significant: The economic impact associated with additional boating traffic and resulting expenditure in the City is estimated to be between \$403,000 and \$504,000 at the end of 10 years' time (as measured in \$2018). This is considerably more than the current level of approximately \$150,000.

Recommendations:

The purpose of this broad and high-level study was to determine whether or not market demand for boating in the St. Lawrence River appeared to support an expansion of the Brockville Municipal Marina and, if so, what basic configuration and form an expanded operation would take. It was not intended to be a definitive design study or business case. Rather, it was understood that if this analysis appeared positive, a number of subsequent studies would be triggered. The set of recommendations presented here is aligned with that understanding. The time frame for recommendations is:

Short-term: undertaken between now and the end of 2019

Medium-term: undertaken over the 2020 – 2022 period

Longer-term: undertaken in 2023 and beyond

1. Collect more rigorous baseline data from both transient as well as seasonal boaters. *(short-term)*
2. Work with the BIA and other key waterfront partners [e.g. the Aquatarium] to create a product development and marketing strategy specifically aimed at the transient boater market. *(short-term)*
3. Undertake communications (possibly through a survey) with existing seasonal slip owners at the municipal marina to apprise them of the investigations into relocation of the seasonal operation and solicit their input to the planning process. *(medium-term)*
4. Similarly, undertake communications with waterfront businesses and other users of the waterfront to apprise them of the investigations into relocation of the seasonal operation and solicit their input to the planning process. *(medium-term)*
5. Develop a more detailed and specific business plan for the new marina operation. *(medium-term)*
6. Undertake a more detailed design study regarding the development of a seasonal marina operation at St. Lawrence Park and a redevelopment / refurbishment of the slips in Tunnel Bay. *(long-term)*

1. Introduction

Brockville is a City of just over 21,000 located on the picturesque shores of the St. Lawrence River approximately halfway between Kingston and Cornwall. Besides boasting a diverse economic base, it is known as a retirement and tourist community, and prides itself on the amenities it offers to both residents and visitors. The most recent statistics from the 2016 Census of Canada reflect the older age skew of the population:

	City of Brockville	County of Leeds Grenville	Province of Ontario
Population Growth, 2011 - 2016	(-2.4%)	1.2%	4.6%
% of Population 0 to 14	13.0%	14.0%	16.4%
% of Population 16 to 64	60.9%	62.8%	66.8%
% of Population 65+	26.1%	23.3%	16.7%
% of Population 85+	3.6%	2.8%	2.2%
Average Age of Population	46.5 years	45.6 years	41.0 years
Median Age of Population	49.9 years	49.3 years	41.3 years

As the table shows, Brockville is in an area of the province where the population base is older. Note that the percentage of population aged 65 and older in the City (over one-quarter of the population) is significantly higher than the provincial average. The median population of 49.9 years implies that fully half the population is age 50 or above. These general factors are true of Leeds and Grenville United County as well, although the City is more extreme than the County in this regard. (Note that the overall County is growing at a slow pace, as opposed to slight decline in population in the City itself.) These demographics are significant to the present study as older individuals are more likely to be retired and in the phase of life where they are seeking recreation and enjoyment suited to their age and ability. Boating is one such activity.

Added to this is the fact that the stretch of the St. Lawrence River in the Thousand Island area around Brockville is one of the mostly densely traveled and populated recreation scenic boating destinations in North America, resulting from its combination of cottagers and local and distant recreational boaters. The fact of a closely shared international border adds to its uniqueness and popularity. Its scenic importance is recognized on both sides of the border with proliferation of State of New York parks on the US side while the Parks Canada (established 1904) and consisting of 21 islands is the oldest National Park in Canada. The area provides a unique visitor experience since it is mainly accessible only by water. It marks where the Canadian Shield meets the Adirondack Mountains providing spectacular geography and scenic beauty.

1.1 Purpose and Objectives of this Study

The general statement of purpose for the present study is to “*undertake a market needs analysis for an expanded marina and marina services operation, supporting expansion of both land and water-based tourism recreation program offerings*” [page 3 of the Terms of Reference]. The Project Description then articulates specific objectives of the marina itself:

- to increase capacity for transient guest boating and recreational needs of this market;
- to provide the platform for investment attraction targeted at complementary boaters and tourist services;
- to increase employment opportunities in the tourism and recreational sectors;
- to utilize innovative mooring design to address issues associated with breakwater challenges and limit impact of wave action on boat berthing; and
- to identify financing options for the capital infrastructure and a plan for investment attraction and financing.

The determination of market demand, which is the focus of the present study, is an essential first step in the move towards an expanded marina operation.

1.2 Activities Undertaken

There were a number of activities undertaken in support of this project. These included:

- Thorough review of all background reports and statistics
- Review of other published sources on boating trends
- Interview program with key stakeholders and interest groups
- Benchmarking survey of other marina operations in the market area (Kingston to Cornwall corridor)
- Meetings with working group and Waterfront Development Committee
- Preparation of draft and final reports
- Presentations

The rest of the Report presents the integrated findings and recommendations from this analysis.

1.3 Overview of Current Marina Facilities in Brockville

At present, there are four marinas operating in Brockville, offering an estimated current and planned total of 358 slips (348 slips currently exist). The majority of these (87%) are seasonal slips. At present, the Brockville Municipal Harbour (the 'Brockville Marina') offers the greatest number of slips to transient boaters – 77% of all current and planned transient slips available in the City, and just 13% of all current and planned slips.

Marina Operation	Seasonal Slips	Transient Slips	Total Slips	Additional Facilities
Brockville Municipal Marina	Estimated by count to be 63	1) Along breakwall: Estimated to be up to 19 (767 linear ft. divided by average boat size of 40' to 50') 2) 10 finger docks 3) 7 'day dock' transient slips Total = 36	99	water; 30- amp power; washrooms; showers; coin laundry; children's play area; wifi; picnic tables; canteen with bar on site
Ernie Fox Quay (City under operating agreement with TSL)	48*	0	48	gas; diesel; pumpout; water; 30- and 50-amp power; washrooms; showers; ice; WiFi; picnic tables; launch ramp
Subtotal City owned slips	111	36	147	
Tall Ships Landing Marina	50	0	50	Same as Ernie Fox Quay
TSL planned slips ("hockey stick")	0	10	10	
Gilbert Marine	30	1 (for a boat up to 30')	31	gas; pumpout; water; 15-amp power; washrooms; ice; picnic tables
Brockville Yacht Club	120	0	120	gas; pumpout; water; 15-amp power; washrooms; showers; ice; WiFi; picnic tables
Total Current Slips	311	37**	348**	
Total Current and Planned Slips	311	47	358	

Notes:

(*) 8 slips at Ernie Fox Quay (included in this total) are not being used for safety reasons.

(**) excludes the 10 'hockey stick' transient slips that have not yet actually been developed.

The location of these marina facilities is indicated in the map below (taken from the 2016 Port Cruising Guide: Lake Ontario and the Thousand Islands, which is the most recent available).



In addition to the marinas themselves, there is a considerable 'boating industry' that has developed around pleasure boating in Brockville. Some of the support businesses in the City include:

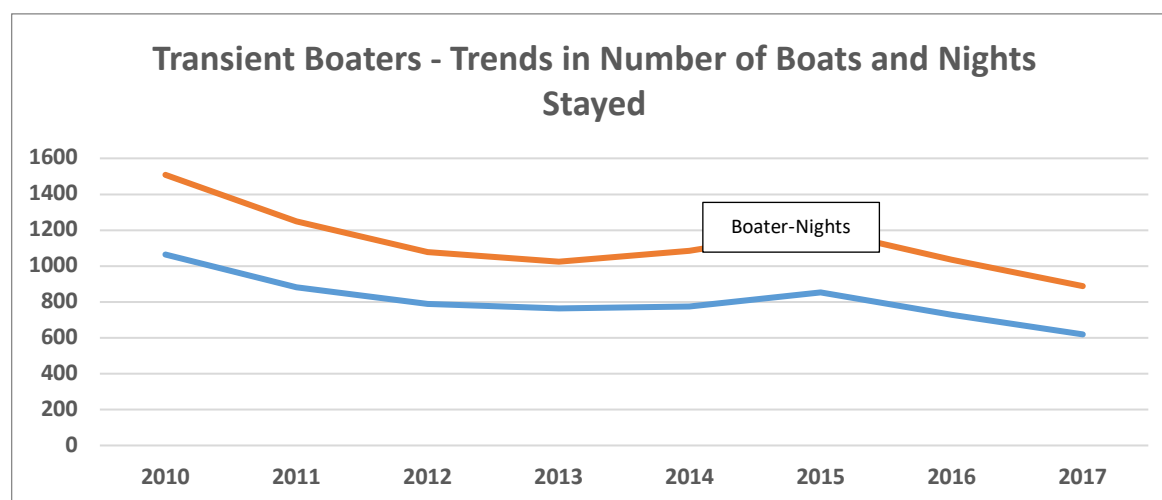
- **Brockville Honda Outdoor Centre:** offers repair (for Honda engines) and sells boating supplies
- **Gilbert Marine:** also offers repair services, haul-out and winter storage, and charts
- **Island Marine Canvas & Upholstery:** makes and repairs canvas and upholstery
- **Mobile Marine Repair:** emergency repair service for gas engines
- **Terry's Marine:** on-site service for powerboats

1.4 Overview of Brockville Marina Operations

Here we provide a brief overview of the current municipal marina operation in terms of the demand for slips (utilization) and the financial situation of the operation.

Utilization and Revenues: Transient Boaters

The trends in utilization of the Brockville Marina over the past 8 years in terms of transient boat usage has been gradually downward as the following graph illustrates.



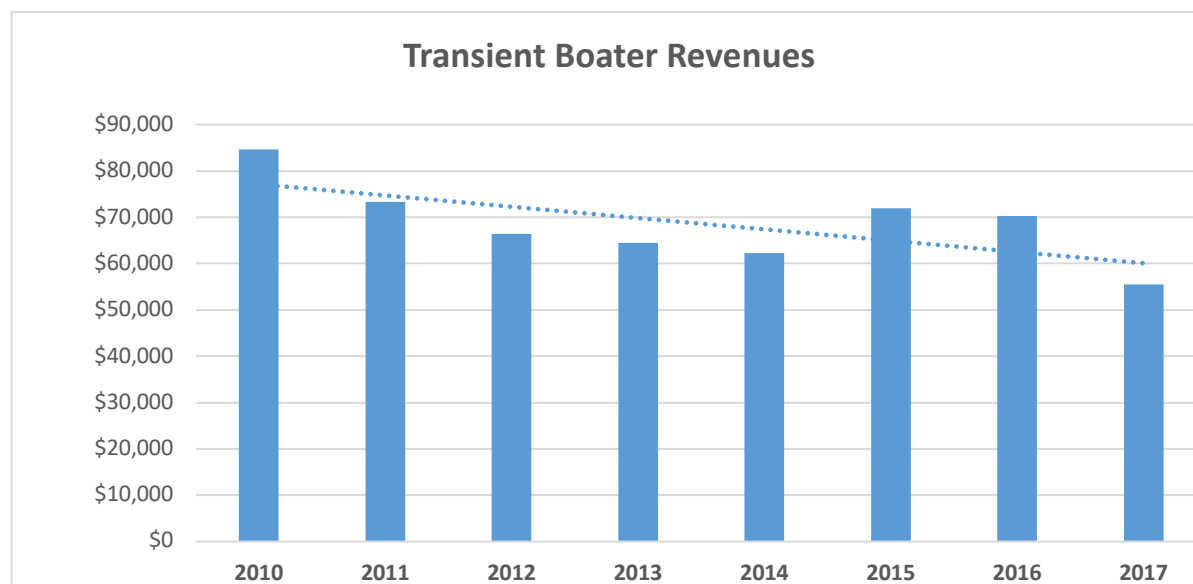
The number of nights stayed per transient boat, on average, has remained fairly constant at about 1.4. However, estimated capacity utilization has dropped as shown in the chart below. It should be noted, however, that the decline in capacity in 2017 may well have been caused by the high water levels experienced in the river that year. As will subsequently be shown, this capacity level is somewhat less than the estimated average capacity utilization for all marinas in the study area, which is estimated at just about 50%.

Capacity Utilization for Brockville Municipal Marina: Transient Boats

Year	Visits	Nights Stayed	Average Nights stayed per Boat	Effective Capacity Utilization*
2010	1,064	1,508	1.42	57.8%
2011	882	1,249	1.46	47.9%
2012	789	1,078	1.37	41.3%
2013	764	1,023	1.34	39.2%
2014	773	1,086	1.41	41.6%
2015	852	1,204	1.41	46.1%
2016	729	1,036	1.42	39.7%
2017	619	888	1.43	34.0%
Average over the period	810	1,134	1.40	43.4%

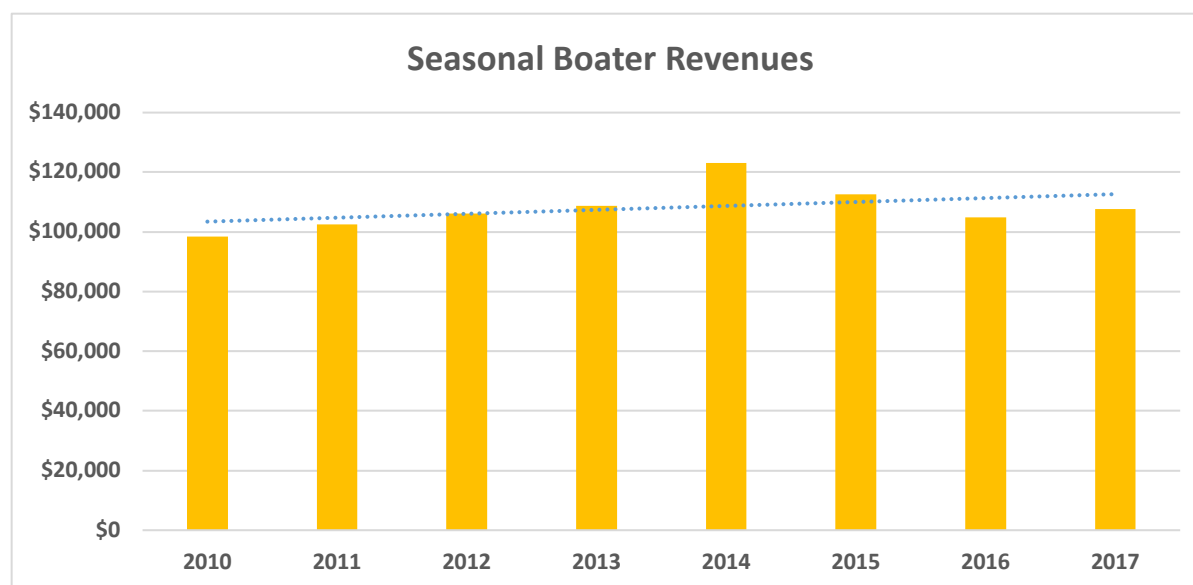
* measured against a theoretical maximum capacity of 2,610 boater-nights (i.e. 29 transient slips times a 90-day season)

Despite fluctuations from year to year, the overall revenues from transient boaters have been falling on average, with a trend line clearly falling:

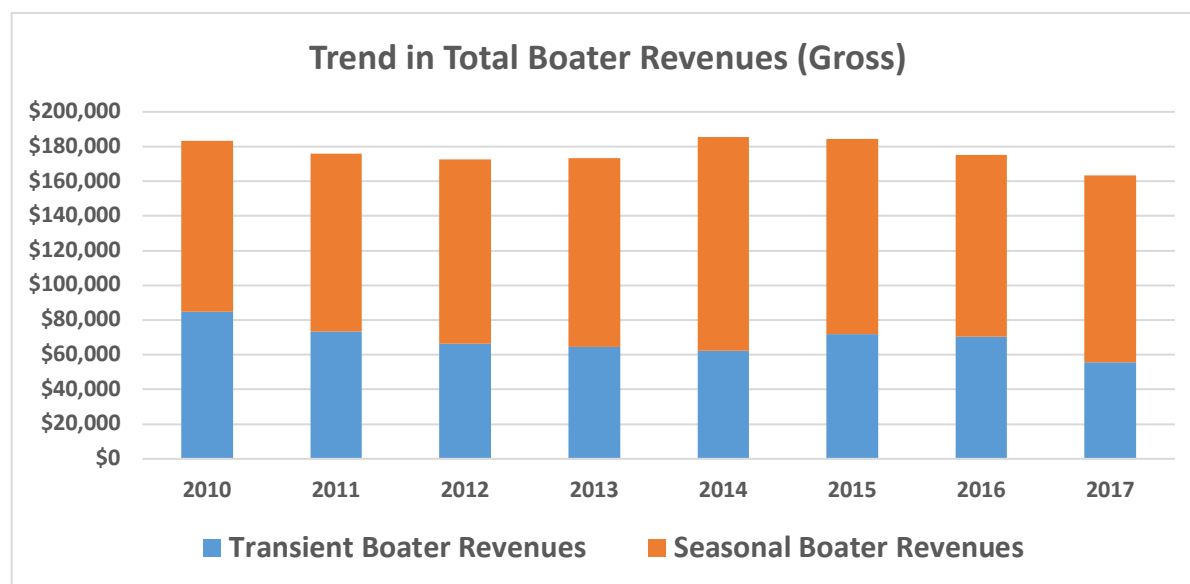


Utilization and Revenues: Seasonal Boaters

Seasonal boater revenues, on the other hand, have been slowly growing in terms of an overall trend, even though there has been some fluctuation from year to year. The utilization for seasonal boaters has remained relatively constant at about 63 users.



Overall, however, trends in total boater revenues have decreased over the 2010 to 2017 period caused primarily by the decline in transient boater use (and revenues) as shown in the chart following.



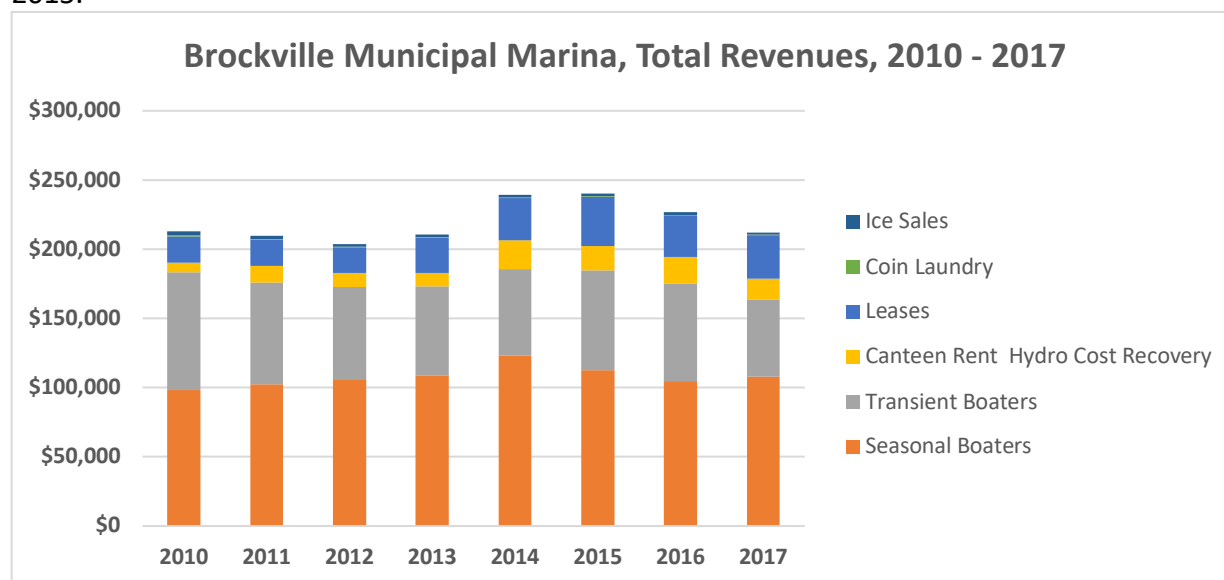
Total Revenues

In addition to these revenues directly from the leasing of transient and seasonal slips (Tall Ships Landing Marina, Boardwalk, Captain Andy, etc.), the Brockville Municipal Marina earns other revenues from the leasing of space to the canteen/bar, as well as ice sales and a coin laundry operation. In total, these revenues are shown below:

Brockville Municipal Marina: Composition of Total Revenues

Year	Seasonal Boaters	Transient Boaters	Canteen Rent / Hydro Cost Recovery	Leases	Coin Laundry	Ice Sales	Total Revenues
2010	\$98,472	\$84,674	\$7,330	\$18,665	\$808	\$3,006	\$212,955
2011	\$102,495	\$73,335	\$11,907	\$19,198	\$515	\$2,248	\$209,698
2012	\$106,214	\$66,368	\$10,140	\$18,593	\$341	\$2,205	\$203,861
2013	\$108,769	\$64,491	\$9,497	\$25,354	\$520	\$1,753	\$210,384
2014	\$123,208	\$62,247	\$21,030	\$30,604	\$485	\$1,543	\$239,117
2015	\$112,592	\$71,922	\$17,968	\$35,312	\$764	\$1,467	\$240,025
2016	\$104,912	\$70,268	\$19,314	\$29,477	\$631	\$2,124	\$226,726
2017	\$107,733	\$55,549	\$15,393	\$31,275	\$737	\$1,137	\$211,824

A graphical representation of these total revenues showing fluctuation over time is presented below. The graph clearly shows a decline in overall revenues in the 2010 to 2012 period, followed by increases in 2013, 2014 and 2015, and followed by a relatively steep decline since 2015.



Costs and Overall Financial Picture

The table below shows overall costs and revenues attributed to the Brockville Municipal Marina operation over the 2010 to 2017 period.

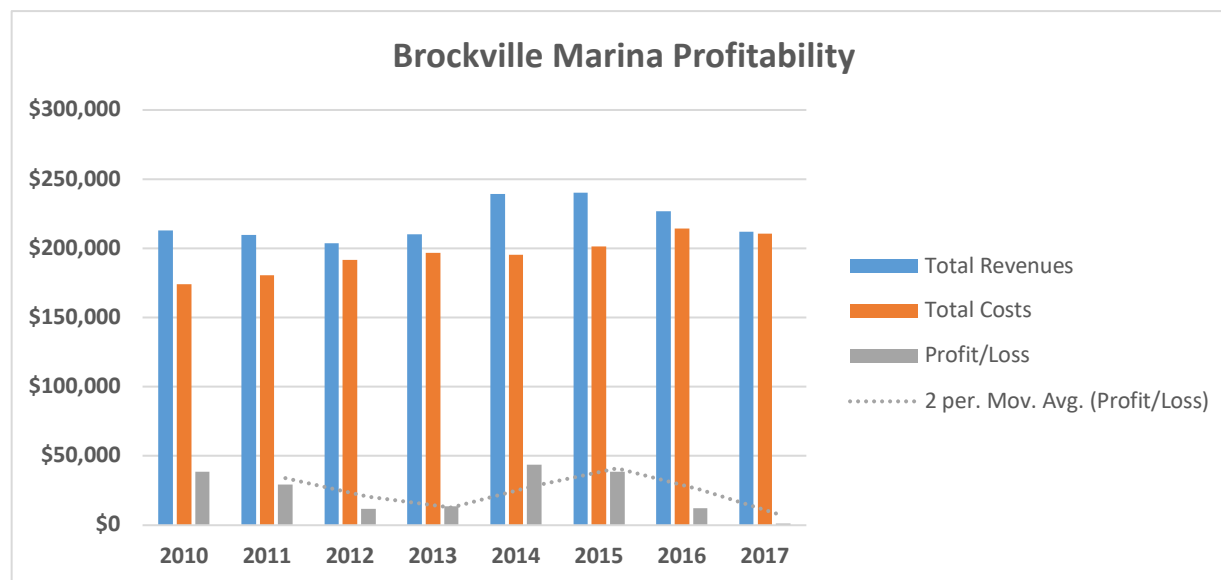
Costs and Revenues, Showing Amount Paid to DFO and Potential Profit without DFO Transfer

Year	Total Revenues	Total Costs	Profit/Loss	Amount Paid to DFO	Profit without DFO Transfer
2010	\$212,955	\$174,283	\$38,672	\$36,384	\$75,056
2011	\$209,698	\$180,390	\$29,308	\$35,166	\$64,474
2012	\$203,861	\$191,837	\$12,024	\$34,489	\$46,513
2013	\$210,384	\$196,750	\$13,634	\$34,645	\$48,279
2014	\$239,117	\$195,456	\$43,661	\$37,127	\$80,788
2015	\$240,025	\$201,459	\$38,566	\$36,525	\$75,091
2016	\$226,726	\$214,247	\$12,479	\$36,744	\$49,223
2017	\$211,824	\$210,628	\$1,196	\$30,361	\$31,557

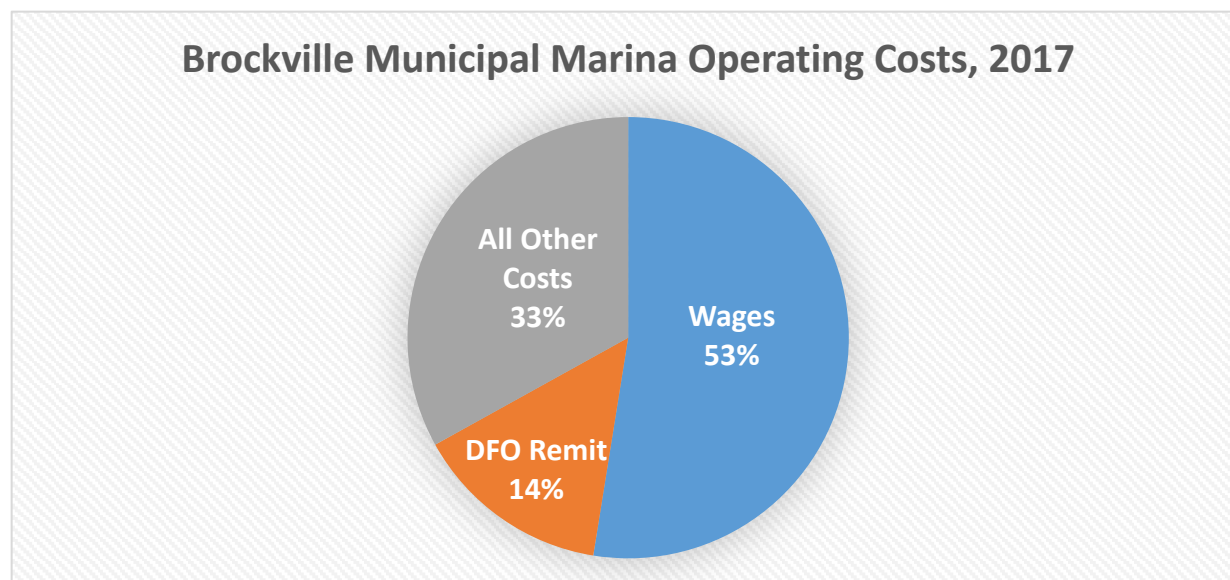
The Brockville Municipal Marina operation has made a profit in every year since 2010, although the last year (2017) was essentially a break-even year. It should be noted that costs do not include depreciation or ongoing maintenance, so the actual contributions may be somewhat more modest. However, were it not for the required remit to the Department of Fisheries and Oceans (DFO) for the lease of the water lots (20% of gross revenues plus HST) the operation

would either break even or generate some profit (which would have been approximately \$75,000 in 2010 and \$31,000 in 2017). Clearly, the remit to DFO is a significant impediment to greater profitability for the existing operation.

The graph below illustrates these trends in terms of the trends in revenues, costs and net profitability over the 2010 – 2017 operating period.



The chart below illustrates the cost structure for the marina. As shown, and not surprisingly, wages and salaries account for the majority of overall costs, although perhaps slightly higher as a percentage of overall costs than the average for other marina operations (our survey of marinas in the study area, subsequently discussed, suggested that 39% of all cost were staffing-related). In this respect, it should be recognized that the Brockville Marina has relatively high staffing costs because of its need to provide enhanced levels of service and security. For example, Blockhouse Island is an open public space and staff are there 24/7 during the summer to ensure boaters are safe and not disturbing condo residents in Tunnel Bay. (As noted previously, the costs also exclude depreciation and maintenance). As shown as well on the chart, and as suggested earlier, the remit to the Department of Fisheries and Oceans also is responsible for a large percentage of overall costs.



1.5 Economic Benefits of Current Marina Operation

A rough estimate of the economic impact of transient boating in the City of Brockville can be developed from the following information:

- A) data from the City of Brockville on its marina operation shows that over the 2010 – 2017 period there were on average 1,134 transient boater-nights sold per year.
- B) data from the marina survey undertaken suggests that most operations have no idea what their transient boaters may spend in their respective communities, but that of those who do, the average was approximately \$190 per transient boater-night. Subtracting the marina fee of approximately \$60 per night charged by the Brockville marina leaves approximately \$130 per party per night spent in the community¹.

As a cross check on B) above, it is interesting to note that the Regional Tourism profile for RTO 9 (the region that includes Brockville) shows that total per person expenditure per night for pleasure tourists was \$154 per person, or (say) \$300 a couple. Subtracting \$100 to \$150 for accommodation, this would leave on the order of \$150 to \$200 expenditure per couple per night for non-accommodation expenditures such as restaurant, gas, groceries, entertainment, etc. This is in the same general ballpark as the expenditure range we see here - assuming for the moment that a boating party is just a couple. (As transient boaters will sleep on their craft, the accommodation portion has been factored out.)

¹ Expenditures at the Marina itself are subtracted to avoid double-counting (as we will later compare the total expenditure in the community to the deficit incurred by the marina, and expenditures at the marina by boaters contribute to the size of this deficit – i.e. it would be larger if boaters' expenditures did not offset it to some extent).

A 2002 study² of recreational boat spending by boaters and Canadian Power Squad members on the Upper St. Lawrence River (Kingston to Cornwall) averaged \$165/day/boat, with some boaters spending considerably higher. Using the CPI, this amount would be equivalent to \$212 per boat in 2018 dollars. These amounts excluded expenditures for additional items such as insurance, boat repairs, marina membership fees, etc.

If one assumes that when docking in Brockville a couple or family dines at a local restaurant, buys some clothing, groceries, gas or souvenirs, the expenditures fairly quickly will sum to an amount over \$100. So the \$130 per transient boat per night spent in the community is reasonable. Of course, there is significant averaging going on here – for every two families that spend the night entirely on their boat and not even venture into town, a third will buy a meal, some clothing, go to the Aquatarium, buy some souvenirs, pick up gas and groceries, and end up spending \$400 - \$500 in a day. (Anecdotaly, one local men's clothing operator spoken to, cited several experiences from the summer of 2017 when on more than one occasion transient boaters purchased between \$1,000 and \$2,000 worth of clothing from the store in a single transaction.)

Accordingly, multiplying A by B suggests total expenditure from transient boaters of approximately \$148,000 in an average season in the community beyond what was spent at the marina itself³. Note that this community benefit is in addition to the profit generated to the municipality by the marina operation.

Note that there is likely additional impact from boaters in the form of expenditure made by day/weekend/trailer boaters who come locally or from a distance and use local boat ramps, but who do not show up as transient boaters on the river. Thus, depending upon the extent to which this is a factor, the above estimates may be conservative.

In future, surveys of transient boaters should be undertaken in order to determine more precisely what the amount of local community expenditure actually is, as well as current behaviour patterns and any suggestions for improvements.

1.6 Overall Market Context: Kingston to Cornwall

In order to understand the market environment within which the Brockville Marina is operating, an inventory of all marina opportunities in the stretch of waterway from Cornwall to Kingston, on both sides of the border, was developed. This market area is shown below:

² <http://www.ijc.org/loslr/en/library/boating/01b%20Economic%20Impact-2.pdf>

³ Note that this is not a full economic impact analysis, which was not asked for in the Terms of Reference for the project. To do this would involve inputting this data into TREIM (the Ontario Government's tourism economic impact model) which would look at the re-circulation of this initial expenditure 'injection' into the local economy and then generate estimates of Gross Domestic Product, Jobs Created, Labour Incomes, and Taxes.



The table below summarizes the current supply of marina facilities in the market area in terms of both the number of marina operations as well as the numbers of seasonal and transient slips offered to the marketplace. Note that the day buoy moorings offered by Parks Canada are **not** factored into this analysis.

Canadian Side

Community	No of Marina Operations			No. of Slips Available		
	Public	Private	Total	Seasonal	Transient	Total
Cornwall	1	0	1	75	70	145
Long Sault	0	1	1	78	0	78
Upper Canada Village	1	0	1	167	45	212
Morrisburg	1	1	2	80	0	80
Iroquois	0	1	1	20	15	35
Prescott	1	0	1	118	30	148
Brockville	1	3	4	385	47	332
Brockville Islands	1	0	1	0	27	27
Mallorytown	0	1	1	30	5	35
Rockport	1	4	5	286	20	306
Ivy Lea	0	5	5	337	17	354
Navy Islands	1	0	1	22	2	24
Gananoque	1	2	3	198	165	363
Bateau Channel	0	3	3	360	30	390
Kingston	2	5	7	489	340	829
Total Canadian	11	26	37	2,545	813	3,358

Source: Inventory compiled by TCI Management Consultants

American Side

Community	No of Marina Operations			No. of Slips Available		
	Public	Private	Total	Seasonal	Transient	Total
Massena	1	0	1	120	0	120
Waddington	1	0	1	20	16	36
Ogdensburg	1	1	2	125	18	143
Morristown	1	2	3	100	16	116
Alexandria Bay	9	9	18	787	327	1,114
Fisher's Landing	0	2	2	145	0	145
Spicer Bay	0	2	2	165	0	165
Clayton	2	12	14	691	250	941
Mud Bay	0	2	2	170	40	210
Cape Vincent	1	3	4	135	36	171
Total American	16	33	49	2,458	703	3,161

Source: Inventory compiled by TCI Management Consultants

In total, then, there are just over 6,500 slips in the market area from Kingston to Cornwall (not counting Parks Canada mooring buoys):

Community	No of Marina Operations			No. of Slips Available		
	Public	Private	Total	Seasonal	Transient	Total
Total Canadian	11	26	37	2,545	813	3,358
Total American	16	33	49	2,458	703	3,161
Grand Total in Market Area	27	59	66	5,003	1,516	6,519

Of this total supply provision, the entire Brockville area's market share is about 5.1%, and the Brockville Municipal Marina's share about 1.5%. The Marina's share of transient slips is somewhat greater at 2.4%.

Shares of Supply

Seasonal Slips	No. of Slips	% of Total
<i>Total Slips at Brockville Municipal Marina (excludes 48 slips owned by City but leased to TSL)</i>	63	1.3%
<i>Total Slips in Brockville</i>	311	6.2%
<i>Total Slips on Canadian Side</i>	2,545	50.9%
Total Slips in Market Area	5,003	100.0%
Transient Slips	No. of Slips	% of Total
<i>Total Slips at Brockville Municipal Marina</i>	36	2.4%
<i>Total Slips in Brockville</i>	37	2.4%
<i>Total Slips on Canadian Side</i>	813	53.6%
Total Slips in Market Area	1,516	100.0%
Total Slips	No. of Slips	% of Total
<i>Total Slips at Brockville Municipal Marina</i>	99	1.5%
<i>Total Slips in Brockville</i>	348	5.3%
<i>Total Slips on Canadian Side</i>	3,358	51.5%
Total Slips in Market Area	6,519	100.0%

2. Market Assessment

2.1 General Trends in Boating on the Great Lakes and St. Lawrence River

The interviews undertaken as well as the background materials reviewed have pointed towards a number of key trends that are at play affecting overall boating on the Great Lakes and the St. Lawrence River. (Unless cited otherwise, trends come from those interviewed.) While these trends generally point to a slowly growing market, several of them have significant implications for a potential expanded marina operation in Brockville. The trends noted are:

- **Market Growth:** Most of the studies and data reviewed point to a slow growth in the economy coupled with an aging and retiring population, implying some growth in the overall boating market. Those studies that attempt to quantify this growth estimate it at between 1% and 4% per year⁴. At a very broad level, this would imply growth in the overall market for both seasonal and transient boaters' slips. Anecdotally, Ivy Lea and Quinte West marinas have added to their capacity and are reported to be doing well. A number of marinas were impacted negatively by high water levels and flooding this spring.
- **Change in the market mix: *More novice boaters*:** Several of the marina operator surveys and some of the interviewees report that as a result of more entrants into the marketplace (i.e. those buying both used and new boats) there are more novice boaters in the boating population. The implications for any new marina operations (or even existing operations) is to make it as easy as possible for novices to 'read' the marina entrance, in order to know where to go to dock. It has been suggested that there may be a market at some marinas for a 'valet service' to help with or talk over docking operations for new boaters (and that this may help attract new transient boaters to a community).
- **Change in the market mix: *More Francophone boaters*:** Marina operators along the St. Lawrence River, in particular, report a change in the market mix. In addition to the 'more novices' factor mentioned above, they report a greater number of Francophone boaters originating in Quebec. Quebec has a two week "construction holiday" in July which

⁴ See for example:

- 1) Business Wire: <https://www.businesswire.com/news/home/20180105005329/en/Global-30-Billion-Recreational-Boating-Industry-Trends> (predicts 3.8% per annum)
- 2) **growth in US demand:** from **National Marine Manufacturer's Association**, which reports that US consumer spending on boats, marine products and services grew by 3% between 2016 and 2017
- 3) **growth in Canadian demand:** from Stats Canada, which shows that domestic market demand for recreational boating has grown at an average annual rate of 2.8% over the 2011 to 2015 period, with some elements of demand (e.g. total imports) being higher than that (e.g. total imports: 4.6% per annum growth over same period) (most recent data available)
- 4) **our survey of marina operators** which basically corroborated the above ranges

attracts boaters to the 1000 Islands area. This clearly has implications in terms of language facility offered, marketing and promotion, etc.

- **Change in the market mix: *Transients from further afield*:** Several survey respondents said that they had noticed that transient boaters they were coming from further afield, including more 'loopers' (i.e. those who do a portion of, or the entire loop through the Great Lakes; down the Atlantic Seaboard through the Inland Coastal Waterway around Florida and into the Gulf of Mexico; and then up the Mississippi back to the Great Lakes). This too may have marketing and promotional implications.
- **Change in the market mix: *More families*:** A couple of operators noted that they were noticing more families with children in the overall boating mix. Again, this could have implications for the types of amenities and services offered to boaters.
- **Change in the market mix: *More new Canadians*:** Although not mentioned in the interviews or the marina survey, it has been noted elsewhere that the number of new Canadians becoming interested in boating is increasing⁵. Many of these new entrants into the marketplace are from countries and areas where there is not an established maritime tradition, and these may represent additional niche market opportunities for marina operations (in terms of providing information, supplies, etc.).
- **Clearer waters:** It was also noted that the waters of the St. Lawrence tended to be clearer and less polluted than that of other boating destinations in the area (such as the Rideau Canal and the Ottawa River, which are more susceptible to agricultural runoff and subsequent eutrophication). The trend here is that these other canals and riverways are getting worse, so the St. Lawrence River will be increasingly preferred.
- **Greater demand for convenience and ease of accessibility:** A general increased demand for services 'right at the dock' was noted, including restaurants, shopping, gas, showers, chandlery (boat supplies), etc. While not specifically mentioned, this could include a convenient shuttle service directly into the downtown in Brockville's case. (And there are more imaginative possibilities to provide enhanced and memorable service. Cobourg, for example, takes unclaimed stolen bicycles, paints them purple, fits them out with oversize baskets on the handlebars, and makes them available free of charge to transient boaters to ride into the downtown. The 'purple bikes' are a sign to everyone in town that these people are boaters and guests to the town.) Aside from a few B&Bs within walking distance of the docks, a lack of accommodation in downtown Brockville was noted by the 1000 Islands Tourism Council who felt boaters who wished on-land accommodation ideally should not have to find it in the vicinity of the 401.
- **Short and increasingly uncertain season:** The pleasure boating season on the Great Lakes and the St. Lawrence River has always been relatively short (July and August), with

⁵ See; <http://www.canadaboundimmigrant.com/focus/article.php?id=1294>

hardier souls boating in May / June, and September / October. Some interviewees suggest that with climate change, there may be a shift in the season and the types of weather encountered. Some have suggested that the spring season may be less certain weather-wise, but nicer weather more likely in September, which may shift the season to some extent more into the fall. All agree, however, that stronger and more unpredictable storms may be likely. Not surprisingly a key demand factor reflecting this may be that marinas that can offer guaranteed shelter and a suite of ancillary services in time of bad weather may have an increasing advantage in future.

- **Change in the type of boats:** Most operators report that boats are getting longer and wider (30 to 50 foot range), which has clear implications in terms of the types of docking and slip facilities offered at marinas. (20-foot, 25-foot and 30-foot boats being the most common – the larger size being necessary to house the holding tanks that are now required for sewage storage on board due to tighter environmental regulations.) Boaters in these larger boats are reported to be more affluent and more likely to spend money in local communities on restaurants and potentially accommodation. In terms of the mix between power and sail craft, it appears as though the current ratio (about 50/50) seems stable, although one operator observed that sailboat owners were ‘much older’ and that he expected an increasing trend towards power over sail in future. The St. Lawrence and Eastern Ontario are reported to be less sail friendly and are considered more power boat cruising regions.
- **More used boats in the market:** According to Canadian boating statistics,⁶ Canadians are buying more used boats than new, largely as a result of the punitive exchange rate on new US-made boats. (For example, in 2016 new boat sales declined by 5.4% while used boat sales increased by 7%. Overall, just over 100,000 boat sales were made to Canadians.) If there are more used boats in the Canadian waters, this could have implications for boat repair services, replacement parts, etc.
- **Shorter stays in communities:** Some marina operators report that their transient boater guests are staying for shorter periods of time in their respective communities. (While this may be true overall, it is noteworthy that Brockville’s average transient stay has remained relatively constant at 1.4 nights.) In any event, this implies that communities having marinas catering to transient traffic may want to become more aggressive in presenting activity opportunities and packages to boaters to entice a longer stay (and thus greater expenditure in the community).
- **Possible Market opportunities:** Possible market opportunities mentioned in an interview by the 1000 Islands Tourism Council was to promote more to US boaters. There have been changes to the reporting requirements for entering Canada (<http://www.glcclub.com/boating-and-uscanada-border>) which make it easier for US boaters to visit Canada. According to the respondent, the Canadian tourism authorities

⁶ See Pat’s Boating in Canada: <http://boating.ncf.ca/stats.html#2016>

have not marketed cross border travel opportunities as aggressively as they should have. Le Boat, a houseboat operation starting up in the Rideau Canal may also be an opportunity if it proves successful. While perhaps not directly related to this project, the Great Lakes Cruising Coalition believes there is an opportunity for Brockville to participate more actively in attracting cruise ships and believes Centeen Park has sufficient length and depth to accommodate some of their current fleet.

2.2 Benchmarking: Specific Performance of Marinas in the Study Area

A survey of all 66 marina operations in the Kingston to Cornwall corridor was attempted. In total, 15 operators responded, representing a response rate of about 23%. This was deemed quite respectable given the time of year in which the survey was undertaken (December to February) and the fact that marina operators are notoriously reluctant to share information.

Highlights from the survey responses were as follows:

Characteristics of Respondents

- Most private businesses (53% - 8 respondents)
- Most in business for long time (10 respondents: 25 years+ and 13 respondents: 10 or more years)
- Total coverage: 1,031 seasonal slips; 271 transient slips
- Most can accommodate large boats 40+ feet (60%); 27% 30 feet or shorter
- Services offered:
 - *Pumpout: 73% (11 respondents)*
 - *Repair services: 60% (9 respondents)*
 - *Electrical plugin: 60% (9 respondents)*
 - *Gas: 53% (8 respondents)*
 - *Border entry: 40% (6 respondents)*
 - *Retail store: 33% (5 respondents)*
 - *Laundry: 27% (1 respondents)*
 - *Shuttle service to town: 7% (1 respondent)*

Capacity Utilization (14 responses)

- Seasonal slips: all 75%+, several 100%
- Transient slips: most in 25% - 50% range (33%)
- Ever turn away business? Yes: 53%; No: 47%
- Number of nights turned away: estimated 103 nights (average of 12 nights per marina that turned away business, or one night in 5 over the season)

Financial Performance

- Operating revenues (13 responses):
 - *Less than \$50K: 21%*
 - *\$50K – \$100K: 14%*
 - *\$100K – \$250K: 21%*
 - *\$250K - \$500K: 7%*
 - *\$500K - \$1M: 29%*
 - *Over \$1M: 7%*
- Sources of revenues (13 responses):
 - *Seasonal slips: 32%*
 - *Transient slips: 21%*
 - *Repairs: 15%*
 - *Retail sales: 11%*
 - *Gas: 7%*
 - *Other: 12%*
- Cost areas (12 responses):
 - *Seasonal staff: 22%*
 - *Permanent staff: 17%*
 - *Operating & maintenance costs: 19%*
 - *Utilities: 11%*
 - *Rent, taxes: 9%*
 - *Cost of goods sold: 9%*
 - *Other: 12%*
- Profitability: profit or loss? (11 respondents)
 - *Profit: 36%*
 - *Loss: 18%*
 - *Break even: 45%*
- Profit margin (for those making profit – 4 responses)
 - *Less than 5%: 50%*
 - *More than 5%: 50%*

Key Operating Metrics

	Seasonal Boaters	Transient Boaters
Fee Per Foot	\$30 - \$60	\$0.70 - \$2.05
Revenue per Boat from Docking Fees	\$1,000 - \$3,000	\$20 - \$72
Revenue per Boat from All Fees	\$2,000 - \$4,500	\$26 - \$80

Trends in Demand

Key themes mentioned were:

- *larger boats*
- *wider boats*
- *greater mix of power and sail*
- *more francophone*
- *more families*
- *more novices*

Market Growth

- Reporting 'some or strong growth': 46%
- Reporting 'stability': 27%
- Reporting 'some or strong decrease': 27%

Rate of growth:

- Less than 10%: 60% (of those seeing growth)
- More than 10%: 40%

Response to growth trends (of 6)

- Putting in new facilities: 50% (all increased docking)
- No plans at present: 50%

2.3 Market Demand Scenarios

Based upon the information gleaned from the marina survey and the interviews, as well as the review of background documentation available, it is possible to develop a forecast of overall boating demand in the corridor (Step 1), and to determine the share of this market demand that it may be possible for the Brockville Municipal Marina to capture (Step 2).

2.3.1 Step 1: Overall Forecast of Boating Demand in Study Area

A very rough estimate of the amount of demand for boating in the Kingston-to-Cornwall stretch of the St. Lawrence River can be estimated through the following procedure:

For Transient Slips

- at present there are 1,516 transient slips available in the market area
- assuming a 90-day season (with some shoulder season mid-June to the beginning of July, and from the end of August until mid-September), this implies an upper capacity of 136,200 (rounded) nights
- weighted estimates from the marina survey imply actual current capacity utilization rates over the period of an estimated 46% (see Appendix B)
- this implies approximately 62,500 (rounded) transient user-nights of accommodation over the period
- assuming conservative growth in demand of 1% to 3% per annum (see Trends section) over the coming decade, this would imply a total of 69,000 to 84,000 transient user-nights demanded by the end of the period

For Seasonal Slips

- at present there are 5,003 seasonal slips available in the market area
- weighted estimates from the marina survey imply actual current capacity utilization rates over the period of an estimated 81%
- assuming growth at the same rate as with transient boating, the Kingston to Cornwall market area could see a demand for seasonal slips to the end of the coming decade of between 5,530 and 6,720 (rounded) slips

2.3.2 Step 2: Market Demand Scenarios for Brockville Municipal Marina

A survey of marina operators in the Kingston-to-Cornwall corridor, plus a review of the available literature, suggests that on average the boating market (expressed in terms of demand for both transient and seasonal boater slips) is growing at an average rate of 1% to 3% annually. This would suggest that Brockville is losing market share in the overall market. While the survey revealed that some smaller operations were static or even losing market share (as demonstrated in terms of diminishing demand for slips) others were growing significantly, so that on average the market growth was seen to be within this range. (In fact, recent expansions of marina operations have occurred in Quinte West, responding to growth in the market, and some marinas in the survey indicated an intention to expand operations in light of demand growth.)

The approach taken here is thus to look at two aggregate growth scenarios for boating demand in the entire marketplace: one at the lower end of 1% average annual growth, and one at the higher end of 3% growth per annum. This forecast thus provides an estimate of the range of growth in demand that could reasonably be expected throughout the market area.

Having established the order of magnitude of this aggregate level of demand, the next step is to determine what share of this demand Brockville in general, and the Brockville Municipal Marina specifically, might anticipate. The analysis looks at two scenarios in this regard:

- 1) **Continuation of Current Market Share (Demand):** The foregoing analysis (see Section 1 of this report) has shown that the Brockville Municipal Marina currently has just under a 2% share of all transient and seasonal boater use in the Kingston – Cornwall corridor (the shares are actually 2.4% for transient boat-nights⁷, and 1.3% for seasonal slips⁸). One possible scenario then is to assume continuation of this level of demand satisfaction ('market share') on the part of the marina operation.
- 2) **Become a Boating Destination:** A second possible scenario is to imagine that Brockville positions itself as a major boating destination, optimally located halfway along the Kingston – Cornwall corridor, offering a wide range of activities and opportunities to the boating public. This scenario envisages downtown Brockville as a focal destination point for boaters rather than a convenient pass-by location. This scenario envisages – perhaps conservatively – that the Brockville Municipal Marina might be able to capture 3% of the available market growth.

The table below outlines the broad parameters of demand under these assumptions, and the implications in terms of the number of slips that might be offered by a repositioned Brockville Municipal Marina. Note that in converting 'transient boater-nights' to 'slips' we have assumed the historical capacity utilization rate of 33%, which is the estimated average capacity utilization seen at the Brockville Municipal Marina over the 2010 – 2017 period. This is a 'conservative' approach in that it leads to a higher number of slips being developed. (If, for example, a 50% capacity utilization assumption was used [which is slightly higher than the average seen across the corridor for all marinas] the number of slips required would be only two-thirds the numbers presented below. However, with this lower number of slips, the frequency with which the marina would need to turn away transient boats at peak times would increase.)

Note that lower capacity utilization rates for transient docking than for seasonal docking is normal, as marinas need to provide for peak times (weekends, holidays) to accommodate spikes in demand at those times.

⁷ Calculated as the average number of transient boater nights at the Brockville Municipal Marina (1,134) divided by the calculated total number of transient boater-nights in the corridor (62,500) – see Section 2.3)

⁸ Calculated in the same manner – see previous footnote.

Continuation of Current Market Share

The first scenario as described above yields the following estimates of demand:

	1% Annual Growth Rate		3% Annual Growth Rate	
	<i>Transient</i>	<i>Seasonal</i>	<i>Transient</i>	<i>Seasonal</i>
Estimated Current Demand in Market Area	62,500 boater-nights	5,003 seasonal slips	62,500 boater-nights	5,003 seasonal slips
Estimated total demand in study area at end of 10 years in Market Area (rounded)	69,000 boater-nights (rounded)	5,530 seasonal slips (rounded)	84,000 boater-nights (rounded)	6,720 seasonal slips (rounded)
Market Share Approach				
Demand: Brockville Municipal Marina retains current market share of 2.4% for transient and 1.3% for seasonal	Current share of demand is 2.4% = 1,656 boater-nights of 69,000 (in 10 years)	Current share of demand is 1.3% = 72 slips of 5,530 slips in 10 years	Current share of demand is 2.4% = 2,016 boater-nights of 84,000 (in 10 years)	Current share of demand is 1.3% = 87 slips of 6,720 slips in 10 years' time
Implied Slips (assuming 33% capacity utilization): Brockville Municipal Marina retains current market share of 1.8%	56 slips (assuming 33% capacity utilization)	72 slips	68 slips (assuming 33% capacity utilization)	87 slips
	Total = 128 slips		Total = 155 slips	

The above table is complex, so a narrative description of how these figures were calculated may help. First, overall demand for both seasonal and transient slips throughout the entire Kingston to Cornwall area is calculated for two scenarios: a conservative one assuming only 1% annual demand growth and a more ambitious one assuming 3% annual growth in demand. This yields estimates of 69,000 transient boater-nights and 5,530 seasonal slips for the entire market area for the 1% growth scenario, and 84,000 transient boater-nights and 6,720 seasonal slips for the entire market area for the 3% growth scenario.

Assuming that the Brockville Municipal Marina is able to retain its current market share of 1.3% of all seasonal slips throughout the market area, this would imply 72 slips under the 1% scenario and 87 slips under the 3% scenario.

With transient slips, the calculation is slightly more complicated. At present, the projections throughout the entire market area are for 69,000 transient boater-nights to be demanded under the 1% growth scenario, and 84,000 transient boater-nights under the 3% scenario. Assuming a continuation of the current market share for the Brockville Municipal Marina of 2.4% of this demand (as shown above), would imply that the Brockville Municipal Marina would accommodate between 1,656 (under the 1% scenario) and 2,016 transient boater nights (under the 3% scenario). However, in order to determine the number of slips that this would require, it is necessary to determine the reasonable **capacity utilization** of slips that would accommodate these boaters. If all slips were occupied entirely throughout the (say) 90-day

season, then at the lower market growth scenario, only about 18 slips would be required (i.e. 1,656 divided by the 90-day season). However, obviously, not all transient slips are occupied all the time. Assuming a one-third capacity utilization rate (which is historically about what we have seen for transient slips throughout the market area) then 56 slips would be required⁹. By the same reasoning, at the higher 3% growth rate scenario, 68 transient slips would be required.

Adding together the seasonal and transient demand figures gives total demand for the Brockville Municipal Marina of 128 slips under the 1% scenario and 155 slips at the 3% growth scenario.

Becoming a Boating Destination

Under this more aggressive scenario, Brockville becomes a significant boating destination within the market area, and is able to capture a 3% share of the demand for both transient and seasonal slips. Under the same logic as in the previous scenario, the demand would be as follows:

	1% Annual Growth Rate		3% Annual Growth Rate	
	<i>Transient</i>	<i>Seasonal</i>	<i>Transient</i>	<i>Seasonal</i>
Brockville becomes more significant boating destination (market share of demand at 3%)	= 2,070 boater-nights	= 166 slips	= 2,520 boater-nights	= 202 slips
	69 slips	166 slips	84 slips	202 slips
	Total = 235 slips		Total = 286 slips	

In the next section, various ways and means of marketing Brockville more aggressively as a major boating destination are discussed.

2.4 More Aggressive Marketing of the Brockville Municipal Marina

To summarize the current situation: The Brockville Municipal Marina has been fairly stable financially over the period 2010 to 2017. Gross revenues from boaters and related operations have varied between \$200,000 and \$240,000, although the trend has been downwards since 2015. While the operation has been profitable, the marina was essentially at break even in 2017, possibly influenced by high water levels last year. A potential concern is a longer term decline in transient boater traffic. In this respect, the Brockville marina seems to have been underperforming other marina operations in the Kingston – Cornwall corridor for some time. Its capacity utilization, while better than some, still appears to be somewhat lower than the estimated average for other marina operations.

⁹ The actual calculation is 1,656 transient boater-nights divided by a 90-day season, times 3 (to reflect a 33% capacity utilization rate, or the fact that on average throughout the season a transient slip is used for 1 of every 3 nights).

This analysis, however, shows the overall market to be growing and changing, at an estimated 1% to 3% growth rate annually (on average, even though there will undoubtedly be swings in demand from one year to the next depending upon weather and economic factors). However, assuming that Brockville is more aggressive in promoting itself to the transient boater market, it does have the potential to increase its capacity utilization to an 'average' performance for marinas overall.

This improved market positioning could be achieved through a market framing that positioned Brockville as **the** go-to ('must see') transient boating destination in the corridor. The focus here would be on the multi-dimensional experience and various attractions and events that downtown Brockville could offer to the transient boater. This could have very interesting marketing and product development components:

Product Development	Marketing Messages
<ul style="list-style-type: none"> - Shuttle bus or trolley from the marina to downtown - Tours of the Tunnel, Aquatarium, etc. - Possibly organized family activities - Possibly evening fireworks - Free bicycle uses (like Cobourg) - Concerts in the park - Easy docking – valet service - Concierge service in French, possibly other languages as well 	<ul style="list-style-type: none"> - Less than a day's sail from any point in the Kingston – Cornwall corridor - One of the most interesting and historic communities along the St. Lawrence - Lots to do for the entire family: educational and entertaining - Discount coupon book for downtown shops & restaurants - Promote easy docking

It must be noted that some of these strategies will have cost implications as well, but these are not investigated in any detail in this assessment.

A Brockville Marina App

The benchmarking assessment revealed that no marinas in Brockville appear to be linked into standard docking apps that are increasingly being used, especially by new and novice boaters. While not a central focus of this study, it is a factor that should be considered and incorporated into future marina configurations, especially as they will increasingly be critical as a means of facilitating market access. The standard applications are:

Dockwa: <https://dockwa.com/search?lat=44.58952439999999&lon=-75.6842858&zoom=9&arrival=06%2F08%2F2018&departure=06%2F10%2F2018&dock=true>

This app provides information on slips and services available for transient boaters at boating locations throughout North America. At present, no Brockville marinas appear to be on the system. This is clearly an area of opportunity for the Brockville Municipal Marina.

Slipfinder: <https://www.slipfinder.com>

This app allows marinas to post slip availability and to adjust price to meet market demand. Again, there is no evidence that any marinas in Brockville take advantage of this system at present, but it is assumed that going forward the municipal marina will avail of this system.

In addition, a specific Brockville tourism app could be envisaged that would allow incoming transient boaters to find out what activities are available, identify and book restaurants in town, obtain discount coupons, etc. This of course describes a broader app that could be aimed at any tourist coming into town by any means, but there could be an area on the app specifically for boaters that would contain information on how to dock, services available, special activities and promotions, etc.

3. Financial Assessment

3.1 Scenarios for Analysis

There are two scenarios that the City of Brockville could contemplate pursuing in terms of accommodating this additional transient and seasonal demand¹⁰. These are:

- (1) **Scenario 1: Improvement of Existing Brockville Municipal Marina and Construction of New Facilities East of Blockhouse Island:** The analysis suggests that the existing complement of slips maintained by the Brockville Marina could suffice to accommodate expected natural market growth in demand for some period of time over the next decade, especially under the lower growth scenario and if capacity utilization could be increased. Under this scenario, the existing number of seasonal and transient slips is maintained, although basic improvements are put in place. As slips are replaced, the sizes of slips would need to be examined to ensure that the mix of facilities provided was accommodating changing tastes and boaters' needs (presumably to accommodate larger boat sizes). Possibly the orientation of slips in the north end of Tunnel Bay is turned to an east-west alignment to facilitate easier docking in light of the prevailing afternoon winds. The existing culvert across Blockhouse Island from Tunnel Bay to the St. Lawrence River could be widened to facilitate flow-through in Tunnel Bay to reduce the buildup of algae and promote the exchange of water.
- (2) **Scenario 2: Tunnel Bay as Transient Boater Destination:** This scenario would involve relocation of all municipal seasonal boating out of Tunnel Bay; all 82 seasonal slips in the Brockville Municipal Marina would be relocated to St. Lawrence Park. This would free up all municipal slips in the current Tunnel Bay for transient boater use. The slips inside Tunnel Bay could be re-aligned to an east-west orientation to ensure easier boat access as well as a dockage upgrade and availability of marina and ancillary services (as described above). As in Scenario 1, a channel would be opened across Blockhouse Island. Incidentally, another benefit of this scenario would be to relocate the profitable seasonal boating operation to an area outside the Department of Fisheries and Oceans water lot area, thus saving what the City otherwise would have to remit to DFO (which in 2017 would have been approximately \$20,000 – i.e. 20% of the seasonal boating revenue in that year).

Redevelopment of land east of Buells Creek: Another possible scenario is to dredge out Buells Creek and a portion of the land on the eastern bank of the Creek opposite the Brockville Yacht Club. This option has not been examined in detail as it would require acquisition and potentially land swaps with the current owner of this land. The additional water space created on both sides of the creek could be developed into slips for motorboat craft with shallower draws than sailboats. It is estimated there could be space for approximately 100 seasonal slips with this option.

¹⁰ These scenarios are independent of the demand scenario modelling presented in Section 2 of this report.

Note that one complication of the situation regarding seasonal slips is that some of the municipal seasonal slips at Ernie Fox Quay are leased to the Tall Ships Landing, which requires in addition to the basic seasonal marina fee, 'club dues' to belong to the fitness club and have access to other facilities at the Tall Ships development. The avoidance of these additional fees might cause boaters to avoid these slips thus influencing the estimates here.

The advantages and disadvantages of each of these options are summarized in the table below:

Scenario	Advantages	Disadvantages
A) Improvement of Existing Brockville Municipal Marina with construction of new Secondary Facility East of Blockhouse Island	<ul style="list-style-type: none"> - Would utilize existing infrastructure in Tunnel Bay and build only for anticipated growth - Actual construction (and related expense) could be put off until demonstrable increase in demand was seen (as a result of marketing improvements) 	<ul style="list-style-type: none"> - Immediate improvements to Tunnel Bay would likely only be a temporary solution for a few years (depending upon growth rate of demand) unless capacity utilization could be increased significantly)
B) Brockville Municipal Marina as Transient-Only Boater Destination	<ul style="list-style-type: none"> - 'Prime' dockage locations near the downtown would be reserved for transient boaters (who will have the highest expenditure in the community) - Seasonal docking in out from the DFO remittance area so municipality will be able to keep all revenues generated – a much more profitable operation - Would provide plenty of room for future growth 	<ul style="list-style-type: none"> - Would imply that the marina management structure would need to manage two operations (i.e. in two locations) - Will need additional parking capacity at St. Lawrence Park to accommodate seasonal boaters - On the other hand, given that the City already operates a campground facility at St. Lawrence Park, there may be some operational synergies realized - Requires solution for existing diving operations

3.2 Operating Costs and Revenues

Here we examine operating costs and revenue implications at a very general and preliminary level.

All costs and revenues are modeled in terms of \$2018. Specific assumptions relating to revenues and costs for the scenarios looking at three levels of demand are:

Revenues:

- the seasonal boating fee will be kept at the current level of about \$1,700 per slip (on average)

- the transient boater revenue per night will be increased slightly to \$70 per boater-night, reflecting the greater value that a night spent at the Brockville Municipal Marina will provide
- revenues from ice and laundry, will remain at the average over the 2010 – 2017 period, which was approximately \$2.00 per boater-night (and are contained within the assumed increase in the transient boater revenue)
- other revenues from leases, and from the concession operations will be 30% of the total revenues from seasonal and transient sales (which has been a relatively constant ratio over the last 4 years)

With these assumptions, operating revenues (rounded) under the various demand scenarios considered are:

Market Share Assumption	1% growth per annum	3% growth per annum
Brockville Municipal Marina retains current market share of 2.4% for the transient boating market and 1.3% of the seasonal market	\$310,000	\$376,000
Brockville becomes more significant boating destination (market share of demand at 3%)	\$555,000	\$676,000

Costs:

- current costs are approximately \$1,700 per slip (considering all current costs **less** the DFO remittance); however, assume that because staffing costs are so large a part of this that there can be economies of scale that will bring this costs factor down to 75% of this unit cost, so \$1,300 per slip (rounding up)
- for slips within the DFO remittance area, 19% of slip-related revenues (the current ratio, recognizing that not all revenues are remittable) will be treated as a cost item
- seasonal boating capacity is assumed to be at 90% (which reflects the current average at the marina)
- for scenario (B) involving two locations (i.e. where the seasonal marina operation is moved to St. Lawrence Park) an additional half time staff position will be required for coordination activities (at an assumed cost of \$30,000)

With these assumptions, operating costs (rounded) under the various demand scenarios at the 3% market growth level for the three physical design configurations are:

Market Share Assumption	Average Slip-Related Costs	DFO Remit Costs (assuming the 3% market share scenario)	Additional Staffing Cost*	Total Costs
A) Improvement of existing Brockville Municipal Marina with construction of new Secondary Facility East of Blockhouse Island	\$305,000	\$71,000	\$0	\$376,000
B) Tunnel Bay as Transient-Only Boater Destination	\$372,000	\$27,000**	\$30,000	\$429,000

* Note this is staffing over and above the 'regular' staffing that would be contained in the 'slip-related cost/ column

** assumes no remit on seasonal slip fees, as the seasonal slips would be located in St. Lawrence Park, outside the DFO remit area

Range of Revenues and Costs

As the foregoing indicates, and the following table summarizes, there is a wide range of revenues and costs implied by the various scenarios considered, ranging from the Marina incurring a small loss or making a modest profit. A more specific design and operational scenario would determine where within both ranges the specific operation is likely to fall.

	Low End	Mid-Point	High End
Range of Revenues	\$310,000	\$493,000	676,000
Range of Costs	\$376,000	\$403,000	\$429,000
Net Income	(\$66,000)	\$90,000	\$247,000

3.3 Economic Impact Upon the Community

Previously it was estimated that the additional expenditure in Brockville associated with current transient boaters was on the order of \$148,000 annually and that, even though the City's existing marina operation was run at a deficit, this represented a good return on investment. Applying the same logic to future anticipated boating under the three demand scenarios previously outlined could imply a significant increase to this expenditure. This would result from two factors:

- 1) Additional transient boater-nights in the City as a result of marina expansion and more aggressive marketing; and
- 2) Greater expenditure per boater as a result of this increased marketing (e.g. more packaging, greater promotion of what is available, new product development, etc.).

Relating to the second point above, the current level of expenditure per boat per night (excluding what was spent at the marina) was estimated to be \$130 per night. If this could be increased to \$200 per transient boat per night through the initiatives mentioned above, then the economic impact in terms of additional expenditure associated with each demand scenario would be:

Demand Scenario	Transient Boater-Nights (assuming 3% per annum growth scenario)	Estimated Additional Expenditure
Brockville Municipal Marina retains current market share of 2.4%	= 2,016 boater-nights	\$403,000
Brockville becomes more significant boating destination (market share of demand at 3%)	= 2,520 boater-nights	\$504,000

4. Recommendations and Implementation

4.1 Recommendations

The purpose of this broad and high-level study was to determine whether or not market demand for boating in the St. Lawrence River appeared to support an expansion of the Brockville Municipal Marina and, if so, what basic configuration and form an expanded operation would take. It was not intended to be a definitive design study or business case. Rather, it was understood that if this analysis appeared positive, a number of subsequent studies would be triggered. The set of recommendations presented here is aligned with that understanding.

Based upon the foregoing analysis, there are several recommendations to be made to the City. These are oriented towards testing the second physical design scenario ('Tunnel Bay as transient boating hub') which has a number of compelling advantages over the other possibilities examined. These are:

- all transient boating is concentrated in Tunnel Bay, which has the advantage of being close to the downtown and thus maximizing likely tourist expenditure (this also assumes a more aggressive and proactive stance on the part of the BIA and the City with respect to product development and marketing to this segment); and
- the more profitable seasonal boating operation (on a per slip basis) is relocated to St. Lawrence Park, where it is outside of the Department of Fisheries and Oceans remit area, enabling the City to keep all of the seasonal boating revenues realized (rather than only 80%)

Recommendations designed to explore further this course of action are as outlined below. In addition, a suggested timeframe for the implementation of the recommendations is proposed. The general timeframe considered for these is as follows:

Short-term: undertaken between now and the end of 2019

Medium-term: undertaken over the 2020 – 2022 period

Longer-term: undertaken in 2023 and beyond

1. Collect more rigorous base line data from both transient as well as seasonal boaters.

The current study was hampered to some extent by not having rigorous base line data on Brockville boater habits and expenditures. The future planning work envisaged will require robust information on expenditures, behaviours (e.g. what activities boaters engaged in, what attractions they visited, etc.) for transient boaters (as well as some more in-depth data pertaining to seasonal boaters). This should be in place so that data from the 2018 boating season can be collected. *(short-term)*

2. **Work with the BIA and other key waterfront partners [e.g. the Aquatarium] to create a product development and marketing strategy specifically aimed at the transient boater market.** In order to optimize the strategy presented here where transient boaters are seen to be a strong economic engine to downtown Brockville, a defined product development and marketing strategy should be developed. Several examples of initiatives that could be considered (including 'apps' that could be incorporated or developed) have been discussed in this report and should be considered. Note that even if the marina expansion does not proceed for any reason, it would still be prudent to develop such a plan. *(short-term)*
3. **Undertake communications (possibly through a survey) with existing seasonal slip owners at the municipal marina to apprise them of the investigations into relocation of the seasonal operation and solicit their input to the planning process.** Existing and potential future seasonal slip holders are key stakeholders in this new direction and should be consulted in the planning process. *(medium-term)*
4. **Similarly, undertake communications with waterfront businesses and other users of the waterfront to apprise them of the investigations into relocation of the seasonal operation and solicit their input to the planning process.** Just as with seasonal slip-holders, existing businesses and organizations using the waterfront need to be consulted in the development of the new plans proposed here. *(medium-term)*
5. **Develop a more detailed and specific business plan for the new marina operation.** With the greater detail resulting from the specific design work that will have been undertaken, a business plan should be prepared that contains more detailed projections of utilization, staffing, operating costs, operating revenues, and profitability, likely over a 5- to 10-year period. This work should also develop in detail a financing plan for the development. Council should then base its decision regarding the pursuit of the new marina development upon this analysis. *(medium-term)*
6. **Undertake a more detailed design study regarding the development of a seasonal marina operation at St. Lawrence Park and a redevelopment / refurbishment of the slips in Tunnel Bay.** The next step in exploring this option would be to retain professional design and engineering expertise to determine the specific configuration for new slip development at St. Lawrence Park as well as improvements to Tunnel Bay (which would include the development of an outflow culvert across Blockhouse Island to improve water quality in the bay itself). This could be a key element in a more integrated overall waterfront development plan for the entire area. If the design is for the marina only, the timeframe should be short-term; if it is to be part of a larger and more integrated vision then the timing will likely extend into the medium-term. *(long-term)*

4.2 Potential Sources of Financing

The formal infrastructure programs that were available in the past to assist municipalities with the development of recreational facilities, including marinas, no longer exist. Accordingly, there are no specific programs to which the municipality can apply for assistance with the capital costs of marina development. Despite this, the City should maintain contact with officials at the Building Canada Fund (overseen by Infrastructure Canada) to ensure that they are apprised of the project, and the economic benefits that it would bring to the overall region.

Provincially, the Eastern Ontario Development Fund will help support innovative projects of over \$500,000 that create jobs and economic impact in communities. Again, there are no specific 'marina' categories in the program, but there is always a chance that a marina project could be framed as 'innovative' and having the potential to create positive economic impact. (The 'transient boater focus' as well as the intent to promote Brockville as the ideal boating tourism destination could achieve this result.)

The greater likelihood, however, is that the City will need to finance the project through standard municipal debentures. Since the major facilities in the marina (i.e. marina building(s), docks, and breakwaters [if applicable]) have an expected life that exceeds 25 years it should be possible to obtain municipal debentures with either a 20 or 25 year amortization period to cover the projected total capital cost of constructing the marina.

APPENDICES

Appendix A – List of Persons Interviewed

Main Client Steering Group

- **Rob Nolan**, Director of Economic Development
- **Kendra Lorimer**, Economic Development Coordinator
- **David LeSeuer**, Waterfront Development Advisory Committee & Counsellor

Waterfront Development Committee Members

- **Councillor J. Fullarton**, Chair
- **Councillor D. LeSueur**
- **Councillor P. Deery**
- **P. Lammens**
- **S. Reid**

Staff Support:

- **Conal Cosgrove**, Director of Operations, City of Brockville
- **Bob Casselman**, City Manager, City of Brockville

Other Interviewees

(1) Michael Adamcryck

Tall Ships Adventure Centre, &
Chair, Economic Development Advisory Team
Michael.adamcryck@gmail.com

(2) Stephen Burnett

Executive Director
The Great Lakes Cruising Coalition
613-544-7857
sburnett@kingston.net

(3) Gary DeYoung

1000 Islands International Tourism Council
gary@visit1000islands.com
315-482-2520

(4) Simon Fuller

President
Fuller Group

simon@fuller.ca

613-223-7265

(5) Hillary Geneau

Executive Director

Downtown Brockville DBIA

hgeneau@downtownbrockville.com

613-345-3269

(6) Nelson Gilbert (and father and brother)

Gilbert Marine

613-342-3462

(7) John Haselmayer

Sup't. Parks Canada

(613) 923-5261 x121

john.haselmayer@pc.gc.ca

(8) Ken Kehoe

President

Kehoe Marine Construction

(613) 659-4626

ken@kehoemarine.com

(9) Andy Neeteson

1000 Islands & Seaway Cruises

captainandy@1000islandscruises.com

captain.andy@sympatico.ca

1-800-353-3157

(10) Chadi Oueini

General Manager

Tall Ships Landing Coastal Resort

chady@tallshipslanding.com

613-915-2176

(11) Doug Panter + 2 other Members

Brockville Yacht Club

dpanter@gbfire.com

613-341-1497

(12) Pam Robertson

Executive Director

Brockville & District Chamber of Commerce

pjrobertson@brockvillechamber.com

613-342-6553

(13) Bill Rogerson

Executive Director

Aquatarium

brogerson@aquatarium.ca

(613) 342-6789

(14) Wendy VanKeulen

Tourism Manager

Brockville & 1000 Islands Tourism

wendy@brockvillechamber.com

613-342-4357

(15) Janis Webster

Administrative Coordinator

Operations Department, City of Brockville

jwebster@brockville.com

613-342-8772 x3266

(16) Matt Wren

DBIA

(613) 498-8522

Appendix B – Calculation of Capacity Utilization Rates from Marina Survey

For Transient Boaters:

An estimate of the weighted capacity utilization rate for marinas overall can be calculated from the survey results by means of the following procedure. Column (a) shows the range of capacity utilization asked about in the survey. Column (b) shows the number of responses in the survey indicating that range as their response. Column (c) shows the mid-point of the range (assume to be representative of the average response within that range. Finally, column (d) shows the total number of 'percentage points' contributed by that particular category. The 'Total' row sums all percentage points for all categories and the 'Average' row shows the total divided by the number of responses: 12. This represents the best estimate of the average for all marinas responding to this question.

(a) Capacity Utilization Range in Survey	(b) Number of Responses	(c) Estimated Mid- Point (rounded)	(d) Contribution to Weighted Percentage Total
0 – 25%	3	12%	36 percentage points
25% - 50%	5	38%	190 percentage points
50% - 75%	1	63%	63 percentage points
75% - 100%	3	88%	264 percentage points
Total	12		553 percentage points
Average for all 12 responses (= Total / 12)			46%

For Seasonal Boaters:

A similar approach was taken to determine the capacity utilization for seasonal boaters using the survey responses. Note that in this case there were only 10 marina operations providing estimates for seasonal boaters:

(a) Capacity Utilization Range in Survey	(b) Number of Responses	(c) Estimated Mid- Point (rounded)	(d) Contribution to Weighted Percentage Total
0 – 25%	0	12%	0 percentage points
25% - 50%	0	38%	0 percentage points
50% - 75%	3	63%	189 percentage points
75% - 100%	7	88%	616 percentage points
Total	12		805 percentage points
Average for all 10 responses (= Total / 10)			80%

Appendix C – Summary of Relevant Background Documents Assessed

The major policy documents prepared by the City of Brockville that provide some context for this initiative are as follows:

1. **City of Brockville Community Strategic Plan**, February 2009, City of Brockville:
 - No specific mention of 'marinas' was made
 - However, there were several specific elements of the plan where enhanced marina facilities would meet the vision very well:
 - *Make Brockville an excellent place to live work and play*
 - *Offer a very high quality of life*
 - *Pursue a family focus, and attract young families to Brockville*
 - *Provide recreational infrastructure*
 - *Revitalize the downtown*
 - *Waterfront redevelopment*
 - *Enhance public use of the waterfront*

2. **Downtown 7 Waterfront Master Plan and Urban Design Strategy**, November 2009, MMM Group:
 - *In 'Marinas & Boat Docking' section:*
 - Endorsed the idea that transient boat docking should be accommodated within the DCWA (Downtown and Central Waterfront Area) whereas seasonal docking was mentioned as being better located in St. Lawrence Park
 - At the time, additional breakwater facilities were not seen as being economically feasible, but report mentioned that new technologies should be monitored
 - *In 'Gilbert Marine / Brockville Yacht Club' section:*
 - Stressed desire to maintain and enhance the range of marine services within the DCWA currently provided

3. **City of Brockville Sustainability Plan**, October 2012, MMM Group:
 - No specific mention of 'marinas' was made
 - However, there were several specific elements of the plan that provide positive context for this work:
 - *Maintain and improve the City's docking and mooring facilities at the harbourfront*
 - *Promote the downtown as a destination to key markets within a 1-hr. drive*
 - *Develop enhanced amenities downtown*

- *Target a 2% increase in visitor utilization and expenditures (presumably per year)*
- *Ensure financial sustainability*
- *Undertake a waterfront public use strategy*
- *Attract new tourists to Brockville and make the City a more diverse place to visit*