



Severn River Marina and Water Access Report

Severn River Association of Property Owners

August 2009

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Introduction

At SRAPO's Annual Meeting in May of 2008, the Severn River Association of Property Owners (SRAPO) raised issues relating to Marina redevelopment and limited water access facilities on the Severn River with the Mayors of the Townships of Muskoka Lakes, Georgian Bay, Severn and the Superintendent of Trent-Severn Waterway (TSW). As a result of discussions at the meeting, it was agreed that the Townships and TSW would work with SRAPO in a study of the situation between the Swift Rapids Lock and Port Severn.

Study Objectives and Approach

The Objectives of the study are to:

- collect information on the current and future requirements for water access slips and the potential for loss or expansion of water access facilities through redevelopment of marinas or other landing businesses that supply water access slips and parking facilities.
- collect information on the availability of alternative sources of land for water access slips, for example, strategically lever or retain and use shoreline road allowances at marina redevelopment sites, expand existing public water front land to provide slips, make available new public waterfront land for additional water access slips by either private, public or public-private partnerships, encourage more commercial and private waterfront landings as recommended in the Township of Muskoka Lakes Marina Report released in 2007.
- analyse and assess impacts of the above on the supply and demand for water access slips needed by residents who do not have road access.
- assess options to deal with issues and impacts, develop and implement strategies and tactics to resolve any identified problems and issues.

The approach taken was to first form a consultation/working group consisting of the Directors of Planning of the three Townships and representatives of both the Trent Severn Waterway and SRAPO. The work group consisted of:

David Parks, Director of Planning and Development, Township of Severn
Carolyn Tripp, Manager of Planning and Economic Development, Township of Georgian Bay
Stephen Fahner, Director of Planning, Township of Muskoka Lakes
Beth McEachern, Realty Manager, Trent Severn Waterway
Greg Goy, SRAPO Volunteer and Study Director

SRAPO drafted a study methodology which was circulated and refined through consultation with the working group. The key steps in the study methodology are:

- each Township Planning department will provide data to determine the current and future demand for water access slips by cottagers for the entire area
- a survey of Marinas and Water Access Landings was completed by SRAPO to:

- identify recent and planned additions and losses of slips,
 - identify trends impacting the viability of facilities providing water access slips and;
 - obtain the views of owners / operators on what could be done ensure these and uses are sustainable
- other research was undertaken, including SRAPO completing a Stewardship Survey of all property owners on the Severn with specific questions relating to water access
 - the information has been combined, analysed and key findings included in an initial report
 - the report will be presented to the Townships and the Trent Severn Waterway, with meetings following to discuss the findings and what to do about these issues.
 - SRAPO members will be briefed on the progress of the study and have access to information and reports on the Association's website. Operators of marines and landings will also receive a copy of the final report.

The value of the study and the process is expected to be:

- all key players: governments; marina and landing operators; developers, cottagers and township residents will have a clearer, more complete picture of the situation compared to 2007.
- all municipalities and the TSW, having assessed the overall situation could then agree on supporting strategies and tactics in order to better deal with water access land use issues, redevelopment applications and prevent decisions being made in one area that negatively impacts residents in neighbouring Townships

SRAPO is grateful for the contribution and support received from staff of Township Planning Departments, the TSW as well as the owners and operators of marinas and landings who contributed to the survey.

It is important to note that while staff of the each Township and the TSW supported the study and provided information, the views and findings contained in this report are those of the Severn River Association of Property Owners.

Need for Water Access Slips

The need for marina services, including boat docking slips and car parking, comes from a variety of customers, the principal ones being:

1. local property owners and cottagers, primarily those who do not have road access
2. visiting seasonal small craft boaters and fishermen/women
3. transient boaters who travel through the Trent Severn Waterway in cruisers, houseboats etc

This study is primarily focused on the needs of cottagers who do not have road access to properties located between the Swift Rapids Lock and Port Severn. The needs of others, # 2 and 3 have not been addressed in this study.

Information on the number of water access property owners was provided by Planning Departments of the Townships of Muskoka Lakes, Georgian Bay and Severn based on property and zoning data and is summarized in Table 1.

Table 1: Cottages and Vacant Lots Requiring Water Access - Summer 2008
Number of Existing Cottages and Vacant Lots Planned or Potential Based on Zoning

	Existing Cottages	Vacant Single Lots	Potential Lots in large parcels (a)	Total
Township / Sub Area	#	#	#	#
A. SRAPO Area – Swift Rapids to Big Chute				
1. Township of Muskoka Lakes				
1.1 Swift Rapids to Wood Bay	109	32	4	145
1.2 Wood Bay and Lost Channel Area	95	33	4	132
Total Muskoka Lakes	204	65	8	277
2. Township of Severn				
Swift Rapids to Big Chute	12	9	11	32
3. Georgian Bay Township				
Muskoka Lakes to Big Chute	100	61	53	214
Total SRAPO Area	316	135	72	523
B. Big Chute To Port Severn				
Township / Sub Area				
1. Township of Severn				
Big Chute to Port Severn	94	22	14	130
2. Georgian Bay Township				
Big Chute to Port Severn	138	61	9	208
Total Big Chute To Port Severn	232	83	23	338
				0
Total Study Area	548	218	95	861

Sources: Planning Departments of the Townships of Muskoka Lakes, Georgian Bay and Severn.
 Note a – Vacant lots that could be created through severance or subdivision of large parcels with zoning.

The information shown in Table 1 indicates that in the SRAPO area there are 316 existing water access cottages. The majority of the properties, 204 or 65 % are located in Muskoka Lakes with 100 or 32 % in Georgian Bay, respectively.

Also of importance in the SRAPO area, there are 135 “Vacant Single Lots” that are zoned for residential uses and will require water access.

The final information included in the Table is “Potential Lots in large parcels” which represents the number of potential new lots with zoning that could or might be created through severing or subdividing large parcels into individual vacant water access lots.

The first category of existing cottages represent the current need for water access slips while the other two categories of “Vacant Single” and “Potential Lots in Large Parcels” primarily represent the future demand for water access lots, (although a very small number of owners of vacant land may use their property frequently enough to need a boat slip prior to building on the lot).

As shown in Table 1, the need for additional water access facilities, assuming one slip for one lot, will increase from 316 in 2008 by 135 (over 42 %) in the future in order to accommodate growth from vacant lots that already exist and have appropriate zoning. An additional potential of 72 water access lots (another 23 %) could occur should the owners of these properties sever or subdivide existing large parcels zoned for cottages into developable lots.

Based on the number of existing water access cottages and vacant lots currently zoned for water access cottages as indicated in Table 1, in the future water access landings and boats slips will be needed to accommodate 523 cottages, an increase of 207 or almost 66 % above the 316 that existed in 2008.

While the actual rate of future need for additional water access facilities and slips will be determined by:

- annual construction levels for new cottages built on vacant water access lots, and
- construction of new roads and extension of existing roads to reach water access properties

land use planning for water access slips, parking and related facilities needs to ensure that sufficient land is appropriately designated in official plans and is zoned to meet these needs.

To better understand the levels of cottage construction and road building activity, Township Planning departments also provided the following information:

Township of Muskoka Lakes:

Four new cottages were built over a recent five year period and there are no plans for roads along the north shore of the Severn in the study area. (This information needs to be confirmed / clarified by Muskoka Lakes Township)

Based on this information the net demand for water access facilities from the Township of Muskoka will only increase in the future.

Severn Township

The following information was supplied by Severn Township. Over the last five years, an average of 2-3 building permits was issued per year for water access cottage lots between Swift Rapids and Port Severn. This number also includes permits issued for cottage rebuilding projects where an existing cottage was already on the lot.

Also in the same area, on average 5 cottages per year get roads, with 2 to 3 per year estimated in both the Swift Rapids to Big Chute area and the Big Chute to Port Severn area. Within the Township preliminary plans exits to extent Orimat Road to 10 cottages and this may or may not encompass the reports study area. It appears that where Orimat Road currently ends, it may be part of the study area. This information needs to be confirmed / clarified by Severn Township

Based on what was supplied by the Township, with the vast majority of water access lots, (130 out of 162 or 80 %) being located in the section of the Township between Big Chute and Port Severn, (see Table 1) most of the water access construction activity is likely in this area. In addition, extending roads does not automatically mean that property owners will not continue to need boat slips.

The Survey of Marinas and Landing undertaken as part of this study, (see the Survey results in the next section) found that in the SRAPO area 6 property owners located downstream near Swift Rapids who have road access continued to rent slips in Severn Falls. Instead of travelling the long, poorly constructed and maintained road to their properties near Swift Rapids they still opted for boat access from slips in Severn Falls.

Based on this information the demand for water access from property owners in the Township of Severn will increase the least of all townships and be offset by road development but in areas primarily outside the SRAPO study area.

Georgian Bay

There have been approximately 5 new cottages built within the last 5 years on water access lots on the Severn in Georgian Bay Township. (need to clarify this with Georgian Bay Township)

No water access lots have been replaced with road access lots, and no roads are planned.

Based on this information the demand for water access from property owners in the Township of Georgian Bay will increase, albeit slowly and no road development is planned in the SRAPO study area.

Based on the above information from all three Townships, a forecast of new water access cottage construction rates was not completed.

SRAPO Stewardship Plan Survey.

The importance of water access to property owners today and in the future was researched as part of SRAPO's recent Stewardship Survey.

The purpose of this Survey was to gather ideas and views from community members on the issues and actions need to conserve the Severn River and to obtain suggestions on how to best involve all community members in the process. The survey was distributed in late September 2008 to all property owners on the Severn River between Swift Rapids and Big Chute. The complete report is accessible on the SRAPO website at www.srapo.org

The following specific questions were asked relating to water access. How do you access your property?

By:	#	%
Year Round Road	20	15.6
Seasonal Road	29	22.7
Water	79	61.7
Total # of responses	128	100.0

A large majority of respondents access their property by water and only a small minority have year round roads.

What would you say are the most important issues affecting your enjoyment of the Severn River?

Table 2: Ranking of Top Three Issues.

Type of Issue	# 1 Rank	# 2 Rank	# 3 Rank	Total of Top Three Rankings
Poor Water Quality/Pollution	40	16	15	71
Boat Wakes, Boat Traffic, PWC's	23	22	23	68
Garbage Disposal	15	19	20	54
Access to marinas and parking	29	11	8	48
Unregulated Camping	9	17	8	34
Water levels and flooding	3	16	10	29
Night time noise	1	6	6	13
All Terrain Vehicles	1	1	6	8
Vegetation Removal	0	1	6	7

Access to Marinas received the second highest number of 1st Rankings from respondents in the survey.

When water access property owners were asked **if they were no longer able to access their property from where they do now, how hard would it be for them to find another docking slip**, they responded:

	#	%
Very difficult	51	64.6
Difficult	24	30.4
Easy	2	2.5
Very easy	2	2.5
		100.0

Of the seventy five (75) respondents who answered very difficult or difficult to the above question were asked **what would be their biggest problem finding a replacement**, they responded:

	#	%
No slips available	43	57
None located close enough, would have to travel too far	39	52
Cost would be much higher	31	41
Alternatives not suitable, e.g. slips too shallow or crowded, walkways too long and difficult	26	35
Other please specify – e.g. Advancing age	5	7

Note: Percentages total more than 100% as respondents were asked to select all that apply.

The Stewardship Plan survey results clearly indicate that a number of issues exist relating to the availability, location, cost and suitability of boat slips and parking facilities for water access property owners.

Survey of Marinas and Landings

A survey of Marinas and other water access landings was completed by SRAPO in the fall of 2008 to:

- determine the number of boat slips and market conditions
- identify recent and planned additions and losses of slips
- identify trends impacting the viability of marinas and facilities providing water access slips and;
- obtain the views of owners / operators on what could be done ensure these and uses are sustainable

SRAPO completed the first step in the process by proposing a survey approach, drafting a questionnaire and letter to be given to Marina Owners asking for their co-operation. Township Planners and the TSW provided comments on the drafts before the survey approach and material was finalized.

The agreed on approach was to complete personal interviews of the owners or operators of each facility. A list of marinas and landings to be surveyed was prepared based on input from the Township staff, the website of the Ontario Marine Operators Association (OMOA) and other business directories including the yellow pages.

It was also agreed at the request of Georgian Bay Township, that while SRAPO represents only the area of along the Severn between Swift Rapids and Big Chute, the survey would also include marinas located between Big Chute and Port Severn.

Marinas provide a diversity of products and services to waterfront residents and visiting boaters along the Severn. These can include:

- dockage or wet boat slips
- on-land storage or dry-slips
- winter storage
- repair services parts and accessories
- fuel, propane
- groceries, ice, convenience store items
- restaurant or snack bar

- boat ramp
- taxi service
- sales of new and used boats, motors
- fishing boat rentals and bait

The diversity of products and services possible has resulted in a variety of types marina facilities along the Severn. Each location reflects the market for specific products or services offered in that area. For example, the primary business orientation in the SRAPO area is to meet the needs of the water access cottager clientele by offering wet slips, car parking, boat storage and fuel.

From the list of 11 marinas compiled for the survey in the SRAPO area, only 3 used the name marina in their signage, with the Big Chute Marina the only one offering a full range of marina products and services. Five of the other businesses were in reality not marinas but commercial landings that offered far fewer marina products services while another 3 locations were classified as private landings as they were not open to the public and offered just wet slips and parking to family members or others associated with the ownership. See sections A, B and C below for more detail.

The physical dock structures in these facilities are typically well-defined individual slips for use by relatively small boats and runabouts (most 14 to 20 feet). There were limited amounts of extended linear dock lengths that accommodated larger cruisers or houseboats or provided flexibility for mix of larger and smaller boat lengths. The limited number of extended dock lengths that were observed in the SRAPO area was utilized for runabouts and small craft boats consistent with the cottager - water access market, not the larger cruiser market. The Big Cute recently added some new larger docks that can accommodate boats up to 27 feet but these do not appear targeted to cruiser clientele.

With the water access cottager segment of the market dominating and all owner-operators participating, the survey was successfully completed in the SRAPO area.

In the Big Chute to Port Severn section of the Severn, (non-SRAPO area) however, marinas are much more influenced by the cruiser, houseboat and transient waterway boater market. Of the eight marinas visited, most were heavily oriented to the cruiser market:

- two locations were in fact marine resorts providing a combination of land accommodation and larger docks structures catering almost exclusively to the cruiser market
- two were full service marinas with one indicating that 85 % of their slips were for cruisers and reported they had shortages of slips for smaller boats, the second full service marina refused to fully participate in the survey
- two marinas were recently purchased by cottager groups and most but not all of the slips have been reoriented to essentially private water access landings.
- one marina appeared to be closed awaiting redevelopment but had in fact recently reopened and did not return calls to participate in the survey
- another marina has scaled back its product offering, was for sale for redevelopment and did not fully participate in the survey

Because measuring the demand and influence of the cruiser market was out of scope for the study and the poor response rate from a number of marinas, survey results for the Big Chute to Port Severn area could not be provided. The government docks at Swift Rapids, Severn Falls, Big Chute and Port Severn were not included in the survey as they are intended for use only by transient boaters and are not available to cottagers as seasonal landings to access their properties.

This remainder of this section lists ONLY the marinas and landings located in the SRAPO area.

A. Marinas Surveyed in the SRAPO Area – Fall 2008



Tamarack Park and Marina, Severn Falls.

This marina, established in 1960, provides about 62 boat slips, car parking, winter boat storage, fuel, a water taxi service and a boat launching ramp. The marina also helps customers with repairs through an arrangement with an off-site marine mechanic.

The site also has 20 full service trailer park sites.



Severn Falls Marina and Metal Works

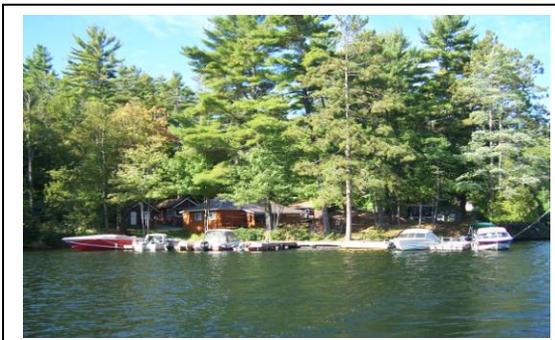
This marina provides 20 boat slips, car parking, winter boat storage, fuel and a boat launching ramp. Used boats, motors and trailers are also for sale at the marina. The Marina also does metal fabrication, constructs dock, boathouses and lifts, provides a barge service, will tow boats that need repairs and helps customers arrange boat repairs to be made. Visit www.severnfallsmarina.com



Big Chute Marina.

This full service marina provides 109 boat slips, car parking, winter boat storage, fuel and propane, a pump out facility, repairs and parts by on-site mechanics, has a boat launching ramp, licensed restaurant and store. The marina is also a Mercury dealer, sells used boats, motors, trailers, accessories and operates a water taxi. Also rents canoes and fishing boats. Open all year.

B. Commercial Landings Surveyed in the SRAPO Area



Riverside Pines Commercial Landing, Severn Falls.

This commercial landing, in operation for over 35 years, provides 22 boat slips, car parking and winter storage.



Severn Dockside Commercial Landing, Severn Falls.

This commercial landing, formerly the 12B Motel, was being renovated at the time of the survey to increase the number of boat slips in 2009, provide car parking and winter storage spaces. The location also has a new Battery Experts store selling batteries, charger, testers, inverters, lighting, flashlights, alternative solar and wind energy and marina and auto electrical products.



G. Stafford Commercial Landing, Severn Falls.

This commercial landing provides 15 boat slips and car parking.



RCS Marketing Commercial Landing, Severn Falls.

This commercial landing provides 20 boat slips, car parking and a boat launch.

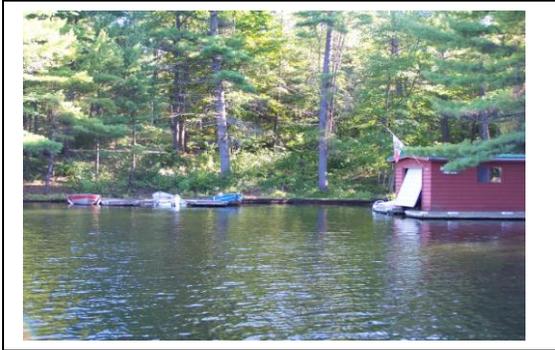


R. Williams Commercial Landing, (Near Buckskin Island).

This commercial landing provides 7 boat slips, car parking, a boat launch and winter boat storage.

This landing also provides a service that allows an additional 7 customers to store their boat out of water when they leave.

C. Private Landings Surveyed in the SRAPO Area



Dinner Time Rapids Private Landing.

This private landing currently provides water access slips and car parking for 3 members of the family that owns it and has been there for more than 30 years.



Baldy Rock Private Landing.

This private landing currently provides water access slips and car parking for the 4 members of the family who have owned it for over 60 years.



Severn Falls Chapel Private Landing, Severn Falls.

The chapel provides 8 slips for members/adherents as well as waterway boaters to attend weekend services and events throughout the week.

Arrangements are also possible for the extended use of slips and parking during the boating season.

D. Other, Lost Channel Landing, Ministry of Natural Resources property, SRAPO area.



This landing has existed for many years. One family built a dock over 70 years ago and was followed by many others. In the fall of 2008 there were 14 double sided docks, 2 one sided docks, 7 beached boats and 1 canoe not at docks at the landing. In total 38 slips and boats were counted. This location is a free private use of undeveloped public land not part of commercial market. Users of this site are not able to find affordable and conveniently located slips close to their property. Parking is also available on the property.

1. Slips Available – Fall 2008, SRAPO area.

The survey collected the number of wet boat slips at each location through physical counts from the water. An interview with the owner/operator was also used to verify the count and identify the number of slips used for:

- marina purposes, for example: dockage / slips used by marinas for gas docks and loading/unloading areas, taxis, fishing boat rental docks
- slips rented to non-water access cottagers for example Trent – Severn Waterway employees and cottagers who have road access but still rent a slip for access to their cottage, other non-cottager users.

Table 3 below summarizes the information for the SRAPO area and shows a total slip count of 300 with 20 slips used by non-cottagers resulting in a net of 280 slips available for water access cottager use.

Table 3 Slips Available, SRAPO Area: Fall 2008			
Type of Slip Provider	Slips Surveyed (see note a) #	Slips Used by non- water access cottagers (see note b) #	Slips Available for Water Access Cottagers #
A. Marinas			
Tamarack Park and Marina	62	*	*
Severn Falls Marina	20	*	*
Big Chute Marina	109	*	*
Total Marinas	191	14 (b)	177
B. Commercial Landings			
Riverside Pines	22	*	*
Severn Dockside	30	*	*
G. Stafford	15	*	*
RCS Marketing	20	*	*
R. Williams	7	*	*
Total Commercial Landings	94	6 (b)	88
C. Private Landings			
Severn Falls Chapel	8	0	8
Dinner Time Rapids	3	0	3
Baldy Rock	4	0	4
Total Private Landings	15	0	15
Grand Total SRAPO Area (c)	300	20 (b)	280

* Data suppressed for confidentiality reasons

Note a: Excludes dockage and slips used by marinas for gas docks and loading/unloading areas, taxis, fishing boat rental docks, and transient overnight cruiser dockage.

Note b: Slips identified for non-water access cottagers, for example: people who work on the river, seasonal and small craft boaters or fishermen and cottagers who have road access but still rent a slip for access to their cottage.

Note c: slips and beached boats at the Ministry of Natural Resources' Lost Channel Landing site have not been included in the table as they are not part of the commercial or private market and are using the site because they cannot find affordable and conveniently located alternatives in the marketplace.

As shown in Table 3 Marinas account for 191 slips or 64 % of the total number, Commercial Landings have 94 slips or 31 %, while Private Landings have 15 slips or 5 %.

The Big Chute Marina and Tamarack Park and Marina have the largest number of slips at 109 (or 36 %) and 62 (or 21 %) of all slips respectively. Such a high share of the total makes the market very dependent on these facilities, particularly the Big Chute which is the only Marina serving a significant part of the Severn River's water access shoreline in Georgian Bay and southern Muskoka Lakes Townships.

The five Commercial landings are all located in or near Severn Falls and are much smaller in size averaging about 19 slips per location.

The water access cottager market dominates the market with 280 slips and only 20 slips out of 300 (about 7 % of the total) were identified by owners – operators as non-water access slip users.

2. Vacancies, Waiting Lists and Rental Rates – Fall 2008, SRAPO area

The survey also collected information on vacancy rates, waiting lists and rental rates for boat slips from owners and operators.

A total of 5 vacancies were reported in the fall of 2008 resulting in a vacancy rate of 1.7 % (5 out of 300 slips).

Waiting lists existed in nearly all locations: 7 out of 8 Marinas and Commercial landings reported they have waiting lists with between 18 to 20 people in total needing a slip in the fall.

For 2008, boat slip rental rates increased significantly ranging from 10% to 30 % to over 80% depending on the location. For 2009, rates continue to increase in most locations well above the level of inflation. Annual charges for a boat slip and car parking space were typically charged by boat length in 2008 varied by location from:

\$ 400.00 to 850.00 for a 14 foot boat
\$ 800.00 to 1,000.00 for a 16 foot boat
\$ 850.00 to 1,050.00 for a 19 foot boat

One marina charged a standard fee of \$ 1,500.00 for boats less than 27 feet and more for larger boats.

Rental rates were consistently lower in the Severn Falls area reflecting the greater number of locations and more choice between marinas, commercial and private landings.

Overall, the low vacancy rate, waiting lists and rapidly increasing rental rates well above the rate of inflation are typical of demand pressures far exceeding supply.

3. Recent Changes in Number Wet Slips and Capacity to Increase, SRAPO area

The survey also asked owners and operators if they had added or reduced the supply of slips in the last five years and did they know if they have capacity to increase the number at their location.

The following summaries the information provided by all respondents:

- 7 slips were added in 2007 and one operator has introduced a service of launching and pulling out customers boats because of limited frontage for slips at that location.
- 12 additional slips were added over the previous 4 years.
- None of the marina or landing operators interviewed indicated that they reduced the number of slips in the last five years.
- Slips were reduced at one other commercial property in Severn Falls that was sold in 2007 where the previous owner rented slips to renters of on-site cottages as well as water access cottagers. A total of 28 slips were withdrawn from the market, although it is not clear how many slips were previously rented only to water access cottagers.

In summary, while 19 slips were added over the last five years, approximately 28 were withdrawn and one Commercial landing operator has introduced a service to launching and pulling out customers boats because of limited waterfront frontage for slips at that location.

Overall the net number of slips has not increased in the last five years and more likely the number has declined.

When operators were asked if they had capacity to increase the number of slips at their site the following responses were received:

- 6 did not know if they were at capacity
- 5 indicated they were not at capacity
- No one indicated they knew what their capacity was

As a follow-up question, operators were asked how they knew if their location was at capacity or not. All answered that it was based on their own assessment. None of the operators indicated they received a determination from either the Trent Severn Waterway, (who approves new slips in the water) or Township building departments, (who approve requests based on land zoning and parking requirements etc.) that indicated what their capacity to expand was.

A number of the operators were also not sure if they had to seek TSW permission to expand if they were installing only floating docks or reorganizing their existing docks.

The Trent-Severn Waterway has extensive information and guidelines available on its website for residential property owners and cottagers to follow when adding docks, boathouses or completing shoreline work. For commercial enterprises or potential investors however, there are no guidelines to follow in order to assess the potential for waterfront expansion without formally applying to the TSW.

4. Planned Additions to Slips

When operators were asked if they were planning to increase the number of slips the following responses were received:

- 3 locations are planning to expand in 2009, collectively adding 17 slips
- 1 location was planning to add 24 slips at a later date to be determined

All three who were planning to expand in 2009 indicated that they had formally applied for approval.

The following consolidates the number of slips available in 2008 to water access cottagers from Table 3 with the 17 units planned in 2009 and 24 planned at a later date:

Slips available to water access cottagers in 2008, (Table 3):	280
New slips planned in 2009:	17
New Slips planned after 2009:	24
Total - (2008 plus planned)	321

5. Need and Supply of Slips – 2008 and at Full Capacity of Zoned Water Access Land.

This section of the report shows information on the need and supply of slips in 2008 and in the future. In Table 4 below, column 1 shows data on the existing number of water access cottages reported in 2008 and the Long Term Capacity in the future based first in Case 1: existing plus vacant zoned single lots and second in Case 2: Case 1 plus other water access lots that are possible if large parcels already zoned are subdivided or severed into additional lots (based on information presented in Table 1 earlier in the report).

Table 4 Need and Supply of Slips – 2008 and Simulation of Full Capacity of Zoned Water Access Land. SRAPO area.			
	Number of Water Access lots (See Note a) 1	Slips Available to Water Access lots (See Note b) 2	Difference 1-2
Existing Situation (2008)	316	280	- 36
2009 Situation	316	297	- 19
Long Term Capacity			
Case 1. existing 2008 (316) plus vacant single lots with zoning (135)= 451	451	321	- 130
Case 2. 451 plus lots from large parcels with zoning subdivided or severed (+ 72)= 523	523	321	- 202

Notes: (a) Source Table 1, Note (b) Source Table 3 and Survey Results subsection 4 above

Column 2 shows the number of slips available based on the survey in the fall of 2008, (reference Table 3) and planned additions noted in the previous section.

The existing situation in 2008 shows the number of water access lots at 316 compared to 280 slips available resulting in a shortage of 36 slips.

For 2009, Table 4 shows a simulation of using the 2008 number of water access lots and the 17 planned new slips, which reduces the shortage to 19 slips.

Also shown in Table 4 is the long term capacity, which is first simulated in Case 1 by comparing the number of existing water access cottages in 2008 (316) plus vacant zoned single lots (135) which totals 451 with the number slips planned to be available at 321 (297 + 24 planned after 2009). Based on this simulation, the difference increases significantly to – 130 slips.

The final long term capacity simulation in Table 4 is Case 2 which adds in the 72 lots that could be created by subdividing or severing large parcels of zoned residential land into water access lots (451+72=523) and compares the total to the known number slips planned to be available 321. Based on this simulation, the difference increases significantly to – 202 slips (523-321).

The data in Table 4 clearly shows that in the short and long terms more docks and slips will be needed to accommodate the existing situation and growth in water access cottagers. As mentioned earlier, the comparison is based on the assumption of one water access cottage lot requires one boat slip.

While this assumption appears sound and logical, the following considerations may be applicable:

- some cottagers / families may in fact rent more than one slip, now or in the future
- some cottagers may not use their properties enough in some years to rent a slip for the season and choose to take water taxis or rides from neighbours when accessing their properties
- some cottagers may make seasonal arrangements with family or friends along the river who have road access instead of renting a slip

Most of these alternative arrangements were researched in the SRAPO Stewardship Plan Survey completed in the fall of 2008. So few respondents indicated these were ways they accessed their property that the survey results for these options were not statistically significant. Moreover, the reason a few cottagers may choose these alternatives to renting a slip is more than likely because there are not enough slips available, a situation that was confirmed in the fall 2008 survey of marinas and landings.

In addition to the foregoing, growth from the following factors will exacerbate the current shortage in the future:

- continuation of a longer term trend for bigger, wider or more powerful boats that require more slip space e.g. pontoon boats replacing runabouts as cottagers age, wake boats replacing ski boats as recreational tastes and activities change
- more competition for existing and future slips from non-local recreational boaters, fishermen and cruisers, see report of the Panel on the Future of the Trent Severn Waterway
- more competition for slips from other shoreline commercial uses: cottage rentals, trailer parks etc.

Accommodating the gap between the need and supply of slips shown in Table 4 in the short term **may** be possible based on the ability of existing facilities and other land zoned for commercial in Severn and

Georgian Bay Township to increase and reach capacity. However, since the marina and landing owners indicated in the survey that they do not know if their facilities were at capacity, and the Trent Severn Waterway has no published guidelines in the public domain to enable this, it cannot be determined if the current and future needs can be accommodated by existing land with zoning that permits slips. Based on the foregoing, it appears to SRAPO that municipal land use planning for this type of land use cannot be successful and appears doomed to failure.

In order for this to be determined, the site of each current marina and landing location would have to be assessed by:

- the Trent Severn Waterway to determine the in-water slip potential and capacity
- Townships would need to undertake a similar assessment on the land portion of these properties to determine if municipal requirements for zoning support and permit further in-water development
- these two actions would need to be co-ordinated and completed at the same time

The same determination would have to be completed for other commercial land that is currently zoned to permit boat slips and car parking uses.

This would support the goal of land use planning to ensure that sufficient land is appropriately designated in official plans and is zoned to meet the needs for water access slips, parking and related facilities now and in the future.

To achieve this along the Severn River, SRAPO believes that it is imperative for the Townships of Muskoka Lakes, Georgian Bay, Severn and the Trent-Severn Waterway to jointly accept responsibility to undertake the work necessary to address the situation.

Until this work is completed SRAPO does not see how local land use planning for this type of commercial activity can succeed, a situation that must be acted on immediately. As part of dealing with this apparent land use planning failure in the short term, SRAPO believes that all full service marinas in the study area should be immediately designated as employment lands to prevent down-zoning to residential uses. Until municipalities can assure cottagers that proper land use planning is in place covering each and all three townships, redevelopment proposals at full-service marinas that propose to reduce the number of water access slips for cottagers should not be permitted, unless the slips are replaced at another existing or new facility to serve the water access market.

Moreover, for land currently used for commercial and private water access landings as identified earlier in this report, applications for official plan or zoning changes or other redevelopment that would reduce slips should be dealt with in the same way and not be encouraged. If applications are received, proponents should have to provide proof that their proposed changes will not aggregate or create shortages and or negatively impact the market for cottager water access slips.

If a municipality or the TSW approve applications that do in fact reduce the number of slips at one marina or landing location, the loss should be offset by replacing the slips at other new locations and facilities without aggregating or creating more shortages. More commercial and private water access landings should be encouraged, not limited or reduced.

6. Trends impacting the viability of Marinas and Landings and views of owners / operators on what could be done to ensure these land uses are sustainable.

When owners and operators of marinas and commercial landings between Swift Rapids and Port Severn were asked about the trends impacting the viability of their businesses and what should be done to ensure their businesses are sustainable the following was provided:

6a. Trends in Product and Services.

Over the last few years 3 owners indicated that they added new products or services to their businesses while 5 did not. The new services introduced were a barge service and dock construction operation and a pull out and boat launching service.

Over the last few years two facilities stopped providing services from their business. The products and services ended were the rental of boats for fishing and confectionary stores.

Over next few years 4 owners indicated that they are actively seeking out opportunities to add new products or services to their businesses and 4 indicated that they are not.

In terms of their future, owners indicated that in five years or so the following statements best describes the situation they would like to be in:

- 3 indicated continuing business as usual
- 3 indicated operating their business as a larger more successful enterprise
- 2 indicated they would not be in the business, they plan to retire
- None indicated operating their business as a smaller less demanding enterprise
- None indicated they would stop operating their business, and be in another one or working for some else

The above indicates that owners of marinas and commercial landings have different outlooks in the next 5 years with just as many wanting to grow their business as maintain it, while two others are seeking to retire in five years.

Changes in products and service are moving in the direction of more construction related activities and away from traditional ones associated with marinas like fishing boat rentals and stores.

6b Factors affecting Marina and Landings and what should be done about them to ensure businesses are sustainable.

When asked about the positive and negative factors affecting their business and what should be done to ensure sustainability, the following was provided:

6b.1. Marinas and landings have experienced significant cost increases which operators feel their customers don't realize or understand:

One operator reported the cost of their insurance increased from \$ 3,700.00 to \$ 11,000.00 in one year with no claims or change in policy coverage. To make it worse, the insurance company did not advise the owner until after customer rates for the next year were set and mailed to them, so the owners had to wait a year to recover the costs.

Another example was the cost to get liability insurance for fishing boat rentals, which increased \$2,700.00 in one year, to a point where it was no longer feasible to continue offering the product.

The Technical Standards and Safety Association, which regulates the storing and selling of gasoline has recently changed standards that have increased marina costs.

Marinas have been negatively affected by other changes in gasoline retailing, for example national brands no longer directly supply fuel - the familiar Shell and Petro Canada signs have been replaced with local ones. As a result, marinas purchase gas from other wholesalers which it was reported added to their cost. With the wide swings in the price of gas in the last year one operator indicated that at one time in the summer of 2008, customers could buy gas retail in Orillia **for less than they paid for gas in their tank at that time from their supplier.**

6b.2. Fuel Sales.

Given the difference in price, it was not surprising that cottagers bring gas to their boats in gerry cans. What is difficult for Marina operators to understand is why customers would pour the gas into their boat tanks in plain view, and sometimes in front of them at the Marina. Apart from the obvious negative impact on the marina operator, the other more serious issue related to what one marina operator indicated: they are liable for any gasoline spills that occur at the marina however caused.

The message here is pretty simple, if you are going to fill up your boat with gas from gerry cans and not from a local marina, transfer it into your boat fuel tank at your dock not the marina's.

The other message from marina operators is that if you don't support their businesses and buy enough gas, this product and possibly the marina will not likely survive in its current form.

6b.3. Competition in the slip rental business.

Two marina operators saw unfair competition in the slip rental business. One indicated that a landing was operating without zoning and was not paying commercial taxes. Another indicated that zoning and the market needs to be a level playing field for all.

Another operator indicated that the current zoning needs to be more flexible to permit water front landings that are not marinas.

The Township of Severn currently has two commercial zoning categories which permit marinas and landing uses: Resort Commercial Type 1 and Resort Commercial Type 2. Marinas do not have their own zoning categories, nor does commercial or private landings. Having a zoning scheme that deals with marinas, particularly the needs of the full service ones, yet also has the flexibility for permitting smaller commercial and private landings is better and would clearly reflect the current situation along the Severn between Swift Rapids and Big Chute. Some types of Resort Commercial Type 1 and Type 2 activities also permit activities like waterfront cottage rentals and trailer parks. The boat slip and car

parking requirements of these commercial uses also needs to be reflected in zoning requirements to ensure the number of slips also needed for these non-water access uses are sufficient and incremental to the needs of water access residents and others.

The Township of Severn is beginning a review of its zoning by-laws in 2009 to harmonize and update them. This presents an opportunity to address the issues raised here and be consistent with the practice in the Township of Muskoka Lakes which permits flexibility and formally accommodates private landings as a zoning category.

6b.4. Cottager Groups Purchasing Marinas

A new trend emerging is for cottager groups purchasing marinas as owners sell or retire. This has occurred in the Honey Harbour and Gloucester Pool areas to three marinas. The main benefits are: it allows the owners to exit the business, cottagers retain access to slips and the land is not lost to residential redevelopment. The Big Chute Marina is developing a proposal for a similar sale.

6b.5. Reassessment.

One marina operator was concerned with the soon to be announced property assessment and its impact on taxes.

6b.6. Parks Canada and the Trent Severn Waterway.

Marina and Landing operators both indicated that Parks Canada should revert to the earlier system of not charging for using the Trent-Severn Waterway. In the upper eastern U.S. this has been done resulting in large increases in boat traffic and economic activity all along the system.

Shortened hours of operation of the TSW was also cited as an area to reverse as was making needed investments to maintain and improve operations of the Waterway.

Another operator was concerned about Parks Canada's plan to charge marinas higher fees based on dock space on the Waterway and indicated if the proposal goes forward he will exit the business.

Boat wake from big boats was cited as a problem in Severn Falls. Solutions were to better post speed limit signs and place a large sign at the train bridge advising boaters coming upstream that they are entering the community of Severn Falls and to slow down. A similar sign should be posted for boats coming downstream at the narrows entrance to the Severn Falls.

6b.7.

Water Quality and Weeds

Weed growth, algae and water quality were also a concern.

Summary of Findings and Next Steps

In 2007, the Township of Georgian Bay wrote in its *“Brief to the Panel on the Future of the Trent-Severn Waterway”*:

“In the last 12 months, three marinas have indicated their intent to close within the near future. A fourth is listed for sale at this moment and may or may not continue as a marina. This situation not only has grave impact on water access residents but also a serious long-term implication.”

Similarly in 2007, Susan Pryke, the Mayor of the Township of Muskoka Lakes also wrote to Panel on The Future of the Trent Severn Waterway with the following two points relevant:

“Loss of water access as marina’s close: The closure of the marina at the Big Chute has been a particular worry to residents who rely on water access to reach their cottages. Any new dwelling built with water access in the Township of Muskoka Lakes must provide evidence that they have a marina slip to provide access to their property. The closure of marinas will be a particular hardship to residents in our municipality, and places pressure on the municipality to find alternative means of access.

Provision of municipal services: The fact that there is no direct road access to connect the residents who have seasonal homes on the Severn River to the rest of our municipality, means we have to rely on partnerships with other levels of government and other municipalities to ensure that residents can access their seasonal homes and receive the service they expect from municipal government.”

In the two years since 2007, real estate markets have turned and pressures to redevelop and downzone marina sites to residential uses have retrenched to await better times.

The findings of this study indicate that more is at issue than the pressures of redevelopment and down zoning of marina land. The amount of land designated in Official Plans and zoning bylaws to permit a sufficient number of water access slips is being questioned: Is the collective amount of commercial land in the three Townships adequate to provide slips and parking to accommodate the magnitude of the future water access residential development permitted in the same Official Plans and zoning bylaws of all three municipalities?

A number of issues have been identified in SRAPO’s Stewardship Plan Survey, conducted in the fall of 2008, which clearly show problems exist relating to the availability, location, cost and suitability of boat slips and parking facilities for water access property owners.

The findings of the survey of marinas and other landings in the report also show:

- Of the 300 slips surveyed, three Marinas account for 191 slips or 64 % of the total number, five Commercial Landings have 94 slips or 31 %, while three Private Landings have 15 slips or 5 %.
- The Big Chute Marina and Tamarack Park and Marina have the largest number of slips at 109 (or 36 %) and 62 (or 21 %) of all slips respectively. Such a high share of the total makes the market very dependent on these facilities, particularly the Big Chute which is the only Marina serving a significant part of the Severn River’s water access shoreline in Georgian Bay and southern Muskoka Lakes Townships.

- The five Commercial landings are all located in or near Severn Falls and are much smaller in size averaging about 19 slips per location.
- The water access cottager market dominates the market with 280 slips and only 20 slips out of 300 (about 6 % of the total) were identified by owners – operators as non-water access slip users.
- Only 5 boat slip vacancies were reported in the fall of 2008 resulting in a vacancy rate of 1.7 %, well below a more desirable rate of 5 %.
- Waiting lists existed in 7 out of 8 Marinas and Commercial landings with between 18 to 20 people in total needing a boat slip in the fall.
- In 2008, boat slip rental rates increased significantly, ranging from 10% to 30 % to over 80% depending on the location. For 2009, rates continue to increase in most locations well above the level of inflation.
- Overall, the low vacancy rate, waiting lists and increasing rental rates well above the rate of inflation are typical of demand pressures far exceeding supply.

Not only do shortages of slips currently exist, in the long term more capacity is needed despite planned increases, with reference to the table on the next page:

- The existing situation in 2008 shows the number of water access lots needed at 316 compared to 280 slips available resulting in a shortage of 36 slips.
- Growth from the following factors will exacerbate the current shortage in the future:
 - continuation of a longer term trend for bigger, wider or more powerful boats that require more slip space e.g. pontoon boats replacing runabouts as cottagers age, wake boats replacing ski boats as recreational tastes and activities change
 - more competition for existing and future slips from non-local recreational boaters, fishermen and cruisers, see report of the Panel on the Future of the Trent Severn Waterway
 - more competition for slips from other shoreline commercial uses: cottage rentals, trailer parks etc.
- For 2009, the table on the next page shows a simulation of using the 2008 number of water access lots and the 17 planned new slips, which reduces the shortage to 19 slips.
- The long term capacity is first simulated in Case 1 by comparing the number of existing water access cottages in 2008 (316) plus vacant zoned single lots (135) which totals 451 with the number slips planned to be available at 321 (297 + 24 planned after 2009). Based on this simulation, the difference increases significantly to – 130 slips.
- The final long term capacity simulation in the table below Case 2 which is Case 1 plus the 72 lots that could be created by subdividing or severing large parcels of zoned residential land into water access lots (451+72=523) and compares the total to the known number slips planned to be available 321. Based on this simulation, the difference increases significantly to – 202 slips (523-321).

Need and Supply of Slips – 2008 and Simulation of Full Capacity of Zoned Water Access Land. SRAPO area			
	Number of Water Access lots (See Note a) 1	Slips Available to Water Access lots (See Note b) 2	Difference 1-2
Existing Situation (2008)	316	280	- 36
2009	316	297	- 19
Long Term Capacity			
Case 1. Existing 2008 (316) plus vacant single lots with zoning (316 + 135)=451	451	321	- 130
Case 2. 451 plus lots from large parcels with zoning subdivided or severed (451 + 72)=523	523	321	- 202

The data in the above Table clearly shows that in the short and long terms more slips are needed to accommodate the growth in water access cottagers. Growth from other sources, recreational boaters, fishermen and others will be additional.

Addressing the shortfall in the short term **may** be possible based on the ability of existing facilities and other land zoned for commercial in Severn and Georgian Bay Township to increase and reach capacity.

In the long term however, this is not likely possible due to:

1. the magnitude of the differences in the numbers between the situation in 2008 and in Case 1 and 2 above, and
2. marina and landing owners indicated in the survey that they do not know if their in-water slips are at capacity and it is not known if their sites have the capacity to increase the number of slips enough to meet expected needs.

It is SRAPO's understanding that the Trent Severn Waterway does not know the slip capacity of sites in the study area and has not published guidelines that could enable owners or planners to determine what the capacity is. As a result, it cannot be determined if the current and future needs can be accommodated by existing land that is zoned to permit slips. Based on the foregoing, SRAPO does not believe that proper land use planning for marinas and landings can be successful and it is apparent that land use planning is doomed to failure.

Next Steps:

In order to move solutions forward, the site of each current marina and landing location would have to be assessed by:

- the Trent Severn Waterway to determine the in-water slip potential and capacity

- Townships would need to undertake a similar assessment on the land portion of these properties to determine if municipal requirements for zoning support and permit further in-water development
- these two actions would need to be co-ordinated and completed at the same time

The same determination would have to be completed for other commercial land that is currently zoned to permit boat slips and car parking uses.

Potential landing sites owned by the Ministry of Natural Resources, other government departments, commercial or private lands that could become a sustainable supply of slips and parking in the future need to be identified and reviewed.

Two marina operators saw unfair competition in the slip rental business. Another operator indicated that the current zoning needs to be more flexible to permit water front landings that are not marinas.

The Township of Severn currently has two commercial zoning categories which permit marinas and landing uses: Resort Commercial Type 1 and Resort Commercial Type 2. Marinas do not have their own zoning categories, nor does commercial or private landings. Having a zoning scheme that deals with marinas, particularly the needs of the full service ones, yet also has the flexibility for permitting smaller commercial and private landings is better and would clearly reflect the current situation along the Severn between Swift Rapids and Big Chute. Some types of Resort Commercial Type 1 and Type 2 activities also permit activities like waterfront cottage rentals and trailer parks. The boat slip and car parking requirements of these uses also needs to be reflected in zoning requirements to ensure the number of slips needed for these non-water access uses also needs to be reflected in zoning requirements to ensure the number of slips needed for these non-water access uses are sufficient and incremental to the needs of water access residents.

The Township of Severn is beginning a review of its zoning by-laws in 2009 to harmonize and update them. This presents an opportunity to address the issues raised here and be consistent with the practice in the Township of Muskoka Lakes which permits flexibility and formally accommodates private landings as a zoning category.

To achieve this along the Severn River, SRAPO believes that it is essential for the Townships of Muskoka Lakes, Georgian Bay, Severn and the Trent-Severn Waterway to jointly accept responsibility and to undertake the work necessary to address the situation. SRAPO believes the involvement of all parties is required by the Province of Ontario's 2005 policy relating to multi-jurisdictional planning responsibilities and the role of the TSW in working with municipalities to support their planning.

In its 2005 Provincial Policy Statement, the Ministry of Municipal Affairs and Housing indicated with planning matters within municipalities, or which cross lower, single and or upper-tier municipality boundaries, "A coordinated and comprehensive approach should be used". Source: Provincial Policy Statement, 2005, page 7, Section 1.2 Coordination.

Similarly, the report of the Panel on the Future of the Trent Severn Waterway published in March 2008 Recommendation 8 (f) indicated that the Trent Severn Waterway, "...work with municipalities and others earlier in their planning process". Publishing in water development guidelines for marina and commercial landing activities would complement those published for residential users and remove a Federal barrier to effective local land use planning for water access slips. This would also clarify and

hopefully improve on the situation that now exists where some landing operators are not aware that they should contact the TSW before undertaking any in-water work to re-arrange or expand existing docks.

The first step in the process will be to have a meeting with SRAPO, Township Planners and the TSW to review the findings of the report, incorporate their feedback and resolve any technical issues.

Following this, Township Planners would brief their Mayors and Councils and TSW staff would brief their management. A meeting with SRAPO, the Mayors and Superintendent of the Trent Severn Waterway is planned to review the findings, discuss any issues and work on solutions.

Until this work is completed SRAPO does not see how local land use planning for this type of commercial activity can succeed, a situation that must be acted on immediately. As part of dealing with this apparent land use planning failure in the short term, SRAPO believes that all full service marinas in the study area should be immediately designated as employment lands to prevent down-zoning to residential uses. Until municipalities can assure cottagers that proper land use planning is in place covering each and all three Townships, redevelopment proposals at full-service marinas that propose to reduce the number of water access slips for cottagers should not be permitted, unless the slips are replaced at another existing or new facility to serve the water access market.

Moreover, for land currently used for commercial and private water access landings as identified earlier in this report, applications for official plan or zoning changes or other redevelopment that would reduce slips should be dealt with in the same way and not be encouraged. If applications are received, proponents should have to provide proof that their proposed changes will not aggregate or create shortages and or negatively impact the market for cottager water access slips.

If a municipality or the TSW approve applications that do in fact reduce the number of slips at one marina or landing location, the loss should be offset by replacing the slips at other new locations and facilities without aggregating or creating more shortages. More commercial and private water access landings should be encouraged, not limited or reduced.

In addition to the above, there is also a need for customers of marinas and landings to better understand the issues affecting the ongoing viability of marinas and landings.

SRAPO could facilitate a strengthening of communications between the business community, many of whom are members of the association, and residential property owners. Discussion with its members will be undertaken to assess the feasibility of it.