



Recreational Boating and Tourism Technical Work Group

Synthesis Paper #2 - CA

The Recreational Boating and Tourism Technical Work Group was created to establish water level criteria for recreational boaters and boating related tourism. Boaters unhappy with their access capabilities as a result of high or low water levels have a direct impact on marina owners and the local tourism industry. Typical losses may include the loss of summer and winter storage fees, crane fees, service fees, and, in some cases, retail sales.

This *Synthesis Paper* is part of a series being developed by the Recreational Boating and Tourism Technical Work Group to provide the results of activities conducted as part of the Study. If you would like additional information on the activities of the work group please contact *David White*, 315-312-3042, dgw9@cornell.edu.



For information on US based marinas and yacht clubs please refer to Synthesis Paper #2 – US.

Ontario Marina Impact Survey

By

McCullough Associates & Diane Mackie and Associates

Background

The International Lake Ontario-St. Lawrence River Study Board is conducting a five year study of the changing water levels in Lake Ontario and the St. Lawrence River in order to establish new criteria for improved regulation of Lake Ontario. As part of the study, the Recreational Boating and Tourism Technical Work Group was created to take recreational boating interests into account in developing the overall water management and regulation plan. As part of its year one work plan, the Work Group conducted an extensive survey of physical water depths at marinas, yacht clubs, municipal docks and boat launch ramps along the

Ontario, Quebec and U.S. shorelines of Lake Ontario and the St. Lawrence River; conducted a research survey to obtain marina operators' input re: their needs and impacts related to changing water levels; and developed a model and methodology for estimating water level and boating activity impacts. This report covers the survey of marina operators, specifically for the Ontario shoreline.

Methodology

Research survey data was collected through in-person interviews and telephone interviews conducted from October 1 to December 10, 2001. One hundred interviews (83 in-person, 17 via

telephone) were completed within a universe of 133 marinas operating on the Ontario shoreline of Lake Ontario and the upper St. Lawrence River. This universe of marinas was identified and a list of potential interviewees compiled by the Ontario Marine Operators Association (OMOA). Given the limited size of the universe, the interviewing strategy was to contact and seek interviews with the entire universe, rather than taking a sampling approach. Cooperation was solicited from marina operators via an initial letter from the OMOA, which identified from the outset that the research survey was being conducted on behalf of the Study. A field interviewer recommended by the OMOA and trained by Diane Mackie and Associates conducted interviews.

Screening interviews were conducted by telephone (or in-person if unable to make contact by phone), to ensure we interviewed the appropriate marina manager, one knowledgeable about its operations and water levels. This was followed by the main interview which was usually conducted in person. Flexibility in using a mix of telephone and in-person interviews was necessary to reach the target of 100 completions. The average interview length was approximately 28 minutes.

The survey questionnaire was pre-tested with five initial respondents, October 1 - 5, 2001. The questionnaire was finalized after the pre-test. Interviews were conducted using a pre-structured questionnaire that covered the following topics:

- Physical and operational profile characteristics of marinas (# of slips, types of slips, services offered, etc.)
- Number of boats using marina slips, by length and type
- Perceived impact of water level changes
- Water level preferences
- Problems affecting marina operations (sand bars, rocks, etc.)
- Actions taken by marinas to address problems (e.g., dredging, etc)
- Opportunities perceived by marina operators for better Lake Ontario/St. Lawrence River water level management.

Research Findings

Overview

- Most marinas said that water levels were too low, and half of the marinas want more than 12 inches additional depth.
- Lake Ontario marinas want more additional depth than upper St. Lawrence River marinas, but perceived impact is about the same in both regions.
- Biggest operational problems for marinas are weed growth and shallow depth at slips and docks.
- "Moderate" to "severe" impacts trace back to shallow depth restrictions on boat traffic and slip usability.
- Factors creating negative economic impact on marinas include: cost of actions to correct operational problems (e.g., dredging, weed control); lost revenue due to: restricted draft clientele, shorter season/early haul-out, slips not all used to their maximum designed capacity, and unoccupied slips.
- Marinas want more involvement, education and communication re: water levels and management of water levels, and more constant water levels throughout the year.

Profile of Ontario Marina Operations

- One-quarter (26%) have less than 75 slips.
- One-third (33%) have 75 - 149 slips.
- 79% are "private"-- either private corporate or co-op member owned (Almost all (93%) marinas with less than 150 slips are private).
- 21% are "public" -- mainly municipal (42% of large marinas with 150+ slips are public).
- 92% of marina slip capacity is in seasonal wet slips.
- In-season dry slips are only offered by one-quarter (28%) of marinas.
- Two-thirds (67%) of wet slips are floating slips.
- Most (78%) marinas achieved 80% + occupancy; average occupancy was 87%; half (53%) achieved 95% + occupancy.
- Higher slip occupancy rates at St. Lawrence River marinas (93% average occupancy) than at Lake Ontario marinas (85%).
- Most operators with 100% slip occupancy (47% of marinas interviewed) had waiting

lists (37%) with on average, a peak of 16 customers on the list; more marinas with waiting lists were on the St. Lawrence River (54%), vs. Lake Ontario (31%).

- 55% of marinas had a 2001 occupancy the same the past five years; 37% had a higher occupancy in 2001 than in the past five years.
- A higher proportion of St. Lawrence River marinas offered “core” services (note: "Core" services defined as those offered by 50+% of marinas surveyed) than Lake Ontario marinas.
- One third or less of marinas surveyed offered "additional" services.
- Most marinas reported 2001 services revenue as about the same or higher than the previous four seasons.
- Powerboats predominate on the St. Lawrence River (70%); sailboats (48%) are more common on Lake Ontario.
- Half of powerboats are 21 to 30 feet.
- More than half (59%) of sailboats are 26 to 35 feet.
- Three-quarters (74%) of Lake Ontario marinas have at least some boats with a 6-foot or greater draft, compared to 42% of St. Lawrence marinas with any 6-foot or greater draft boats.

Water Level Preferences

- Most marinas (85%) said current water depths are too low, especially on Lake Ontario (89%), but also on St. Lawrence River. No respondents said depth was too high.
- Over half of the marinas (51%) want more than 12 inches of additional depth.
- One quarter of marinas (24%) want additional 12 inches or less.
- Most (76%) Lake Ontario marinas say they need a minimum of 6 feet or more water depth to operate satisfactorily; half (54%) need between 6 and 8 feet.
- Most (85%) St. Lawrence River marinas say they need less than 6 feet.
- On average, there is about a 3-foot range between minimum and maximum depths marinas say they need to operate satisfactorily.

- At most marinas (76%), the shallowest depth actually measured is less than the minimum depth marinas say they need at the critical shallowest location (by 19 inches on average). A bigger gap exists for Lake Ontario marinas than St. Lawrence River marinas (20 vs. 16 inches respectively).

Impact of Water Level Changes on Marina Operations

- Overall, marinas say water level changes have had noticeable but moderate effect on them.
- One quarter (27%) say the effect has been major ("significant" - 17%) or severe ("devastating" - 10%) during the past five years.
- One quarter (25%) say effect has been minor ("minimal") and 14% say no effect at all.
- Marinas saying they need 12+ inches more depth at their critical shallowest location are suffering more major/severe effects than marinas in need of less than 12 inches additional depth for satisfactory operating conditions.
- Revenue impact is mainly reflected in limitations on boat traffic (i.e., restricted draft).
- Almost half of marinas have had moderate, major or severe problems with weeds and water depth at their docks.
- About one quarter of marinas have moderate to severe problems with channel depths/obstacles and sand bars. These problems were about the same in 2001 as "worst case" of past five years.
- 45% of all marinas have taken some action to date to address weeds and depth at docks. Dredging and weed control are the actions most often taken.
- Outlook for marina expansion is more affected by finances than water levels.
- 29% of all marinas surveyed say they plan to expand their number of wet slips and moorings during the next two years. A similar proportion (34%) with expansion plans among marinas are experiencing moderate to severe effect of water level changes. Finances are a bigger factor than water levels in possibly preventing these plans from going forward, both for marinas

in general and those facing moderate to severe effects of water level changes.

Water Level Management Opportunities

The most important water level management needs and opportunities from the marina operators' perspective are:

- Keep water levels more constant throughout the year.
- Improve communication/notification about water level changes.
- Need greater representation/"voice" for recreational boating.
- Increase education about water level management, e.g., what the problems are, what the IJC's role is, and what can be done to manage water levels.

Opportunities to Improve Lake Ontario-St. Lawrence River Water Level Management

Most marinas (89%) say water levels are too low, and most (75%) do want more water depth. Half (50%) of all marinas (including two-thirds of St. Lawrence river marinas) are OK with current depths, or looking for 12 inches or less of additional depth. The other half (50%), most on Lake Ontario, want more than 12 inches additional depth. The full scope of their need/desire for more depth is unlikely to be fully "fixed" by the IJC. There is a need to educate marina operators on what is doable and what the IJC can realistically be expected to accomplish in "managing" water levels...and if the IJC can't "overcome Mother Nature" with respect to lower than historical water levels, anything that can be done to keep water levels constant, or moderate water level declines, during the season would help marina operators.

While there is great desire for more water depth, the actual effect of low water levels on most marinas' operations appears to be relatively modest to-date (i.e., during the past five years). Three quarters (73%) of marina operators say the effect has been "moderate" (noticeable effect), "minor" (minimal) or none at all. Slip occupancy rates and revenues for most services at most marinas was the same or higher in 2001 versus previous years, despite lower water levels. Keeping in mind that the "net" effect of lower water levels has been moderated by almost half (45%) of marinas taking action -- mainly dredging and weed control -- to address operational problems they have faced. However, for one quarter (27%) of marinas, the effect has been "major" (significant effect) or "severe" (devastating). The impact has been greatest on small, private marinas.

Small, private marinas indicated they need less absolute water depth to operate satisfactorily (than larger and public marinas), and that the deepest draft of their customers' boats is not as deep as that of larger and public marinas. However, they appear to have less "margin for error" as water levels go down.

There is evidence of a relationship between water level fluctuations and impacts upon Ontario marinas. There is a greater perceived impact among marinas that need the most additional water depth, and a large number of marinas have had to take corrective action during the past five years to address operational problems. Several marinas have had "increased expense" and "reduced revenue" economic factors related to water.

Source

Ontario Marina Impact Survey. Final Report. McCullough Associates, and Diane Mackie and Associates. January 2002. 62pp.



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