



Marina Strategy

Newfoundland and Labrador
FINAL REPORT October 2007



MARINA STRATEGY STUDY

Newfoundland and Labrador

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1.0 INTRODUCTION

With 29,000 km of coastline around the Island of Newfoundland and along the Coast of Labrador, our province has literally hundreds of harbours, coves, and inlets. Over our history, most of these were utilized by mariners and fishermen as part the region's fishery enterprises. Those that warranted it, by reasons of geographic location and being a safe harbour, were over time fitted out with government-built wharves, stages, and the other accoutrements needed by the fishing and aquaculture industries. Post-confederation they fell under the network of the Small Craft Harbours Division (SCH) of Fisheries and Oceans Canada.

SCH currently has a network of 376 commercial fishing harbours under its responsibility in NL. Some of these harbours are strategically located, and they were developed as marine centres with travel lifts permitting haul out of vessels, one or more large buildings to effect vessel maintenance and repairs indoors, and an outdoor lay down area (often paved) for onshore over wintering and storage of vessels. SCH leases most of these harbours to locally-controlled Harbour Authorities, who manage them and operate the services and facilities for modest user fees. The management boards of the Harbour Authorities are drawn from local business persons, fishers, Town councillors and residents of the local communities. Minor repairs identified by Harbour Authorities are funded by SCH through contracts and contribution agreements, while major repairs are implemented by SCH as its budget permits. The key observation is that these harbours are almost exclusively focused on commercial and industrial uses, and in NL, SCH support for recreational facilities is the exception rather than the rule.

In 1995, following the 1992 announcement of the Cod Moratorium in NL, and a subsequent Governmental Program Review exercise, the Federal Government approved a Divestiture Program. This program targeted low-activity and derelict fishing harbours across the country for divestiture from the SCH umbrella of responsibility. Harbours with no government or local interest had their facilities demolished, but in most instances and particularly in NL, municipalities realized the value of the harbour asset in their town as a resource for economic diversification. They stepped forward to enter agreement with SCH for nominal lease fees under which SCH agreed to maintain access and service for a minimum of five years. In 2007 there were 246 harbours still under SCH of which 204 are being managed by Harbour Authorities.

The divestiture agreements passed the wharves and facilities of many harbours to the hands of municipalities, harbour management organizations, or private individuals, who realized quickly that their resources to maintain the wharves would be seriously challenged, particularly when communities were facing serious declines in their own populations. New avenues for economic diversification focused on how best to use the newly-acquired harbour facilities to benefit from the recreational boating industry and the tourism potential associated with it.

Ports which were already receiving visitation from recreational boaters, mostly in sailboats (30 ft to 60 ft) and occasional larger power boats (70 ft to 100+ ft), recognized the potential of this type of marine-based tourism as a logical goal for economic development and diversification. The inclusion of selected ports in our province in the itineraries of cruise ships has been actively promoted and supported by provincial tourism officials, but the potential for significant tourism impacts from the recreational boating community, both out-of-province and in-province, has received little formal or promotional attention.

The Federal and Provincial Government, Harbour Authorities, and municipalities are attempting to confirm the potential to attract recreational boaters to their harbours, as a source of economic stimulation and local employment opportunities to augment the variability of the fishery which is still the mainstay for most of them. And governments (Federal and Provincial) are being asked to fund the development required to position selected ports in this process. In the past few years, the Atlantic Canada Opportunities Agency (ACOA) has received expressions of interest for marina development from no fewer than 39 communities, just under half of them are Harbour Authorities, and the rest are not-for-profits or municipalities. ACOA and the Provincial Department of Industry, Trade, and Rural Development (INTRD) are now, through careful study and market assessment, addressing the issues of economic sustainability as they relate to recreational boating in NL.

2.0 STUDY PURPOSE

The high degree of interest around the entire province for the enhancement of harbour facilities, for the recreational boating tourism market, points to the need for a strategy to confirm its viability and to suggest a rational approach to the development of marinas in NL in support of the international market potential. Based on that potential, and a profile of specific recreational boating market sectors, the most strategic locations for recreational boating (island circumnavigation, potential for over wintering in a home port, and intra-bay exploration) will be identified, the capacity of existing and potential locations to participate in this market will be assessed, the needs of recreational boaters (both from out-of-province and local) who recognize our province as an exciting and attractive destination will be quantified, and the level of development for identified locations into a coherent “Marina Development Strategy” will be recommended. Not to be underestimated in this mix is the considerable potential impact from encouraging and supporting the local resident (in-province) recreational boating community - especially since the province’s tourism theme for 2007 is “There’s No Place Like Home.”

3.0 METHODOLOGY

3.1 Study Objectives

The methodology engaged for this study was drawn from the study objectives, and consisted of several steps to build a base of information upon which the strategy for marina development could be acquired.

The process followed in the methodology took its lead from the terms of reference for this study, and included:

a. **Inventory existing marina capacity in the province.**

ACOA and INTRD provided the consultant with a list of those ports from whom an expression of interest or a proposal for marina development had been received. This list was the basis for an inventory of the ports which might comprise a network of logically-located marinas around the province, recognizing how marine-based tourism approaches planning for long-distance cruises and what the needs of those boaters would be once in provincial waters. Site visits were made across the province, and a number of telephone and personal consultations were made with representatives from selected ports on the ACOA list (as well as others) to expand the information base.

b. **Assess existing marinas in terms of market readiness, quality and capacity, and assess the potential of a port without an existing marina to be a participant in the network of ports to be promoted to cruising recreational boaters.**

The term 'marina' is treated rather loosely in this report, because generally a marina is an area in a harbour where you will find recreational boats, such as sailboats and power boats, tied to docks or moorings. In the context of NL, apart from a few communities, most harbours have a mix of recreational boats and a preponderance of commercial (fishing) vessels coexisting in the same harbour and tied to the same docks. In some cases there have been attempts to separate the two by having recreational boats tie up to floating docks. Most of our harbours are commercial fishing harbours managed by Harbour

Authorities under SCH and recreational boats fit in where they can. Most such harbours welcome recreational boaters and do their best to make room, but there are no guarantees and when a harbour is full, visiting recreational boaters can find themselves in a difficult spot with no room to tie up. Fortunately most fishers are quite accommodating and will allow recreational boats to 'raft' alongside, that is tie up to their fishing boats. In a busy, working harbour this can be very inconvenient to the fisher as well as the recreational boater.

- c. **Develop a profile of existing and potential marine tourism demand in terms of both in-province recreational boating activity and the non-resident boater.**

This data was extremely difficult to access, as there is, at best, only ad hoc collection of this information (or no collection at all) by individual ports, and the province's tourism data collection is land-based. There are some efforts afoot to expand the forms used by the province to collect statistical data on visitors to include marine-based visitors, but the consultant was unable to ascertain at what stage these efforts are.

- d. **Develop an assessment tool/framework for assessing existing and future funding proposals related to marina development.**

This tool is in the form of a matrix which includes the critical components of a safe and well-appointed port, keeping in mind the services and facilities that recreational boating visitors are likely to expect and require.

- e. **Prepare an action plan for the development of marine tourism in NL, which will identify specific product development initiatives to be undertaken by government, industry and communities.**

The action plan provided in this strategy evolved from the consideration of the collected data, the application of the assessment tool, and the requirements of the recreational boating community when cruising along our coastline (see Figure 1: Ports Under Consideration).



Figure 1: Ports under Consideration

Leg 1 - South Coast

Port aux Basques (Gateway)
 Grand Bruit
 Burgeo
 Ramea
 Francois
 St. Albans
 Conne River
 Hermitage
 Harbour Breton
 Fortune Hr. Authority
 St. Lawrence
 Burin
 Baine Harbour
 Arnolds Cove
 Mount Arlington Heights
 Long Harbour
 Argentia
 Dunville
 St. Bride's
 Branch
 Mount Carmel
 St. Joseph's
 O'Donnell's
 Admiral's Beach
 Riverhead
 St. Mary's
 Trepassey
 Portugal Cove South
 Renews
 Port Kirwan
 Fermeuse
 Bay Bulls
 St. John's

Leg 2 - East & North east Coast

St. John's (Gateway)
 Foxtrap
 Holyrood
 Brigus
 Port de Grave
 Bay Roberts
 Harbour Grace
 Carbonear
 Bay de Verde
 Old Perlican
 Winterton
 Hearts Content
 Heart's Delight-Islington
 Dildo
 Long Cove
 Hodge's Cove
 Clarenville
 Petley
 Port Union
 Trinity
 Catalina
 Bonavista
 Musgravetown (Deep Cove)
 Port Blandford
 Salton's Brook
 Glovertown
 Greenspond
 Valleyfield
 Wesleyville
 Lumsden
 Musgrave Harbour
 Carmanville
 Seldom
 Fogo
 Herring Neck
 Twillingate / Durrell
 Moreton's Harbour
 Bridgeport
 Embree
 Lewisporte
 Botwood

Norris Arm
 Point Leamington
 Leading Tickles
 Triton
 Springdale
 Kings Point
 La Scie
 Jackson's Arm
 Great Harbour Deep
 Englee
 Croque
 St. Anthony

Leg 3 - West Coast

Port aux Basques (Gateway)
 Codroy
 Stephenville
 Long Point
 Corner Brook, (BIYC)
 Summerside
 Cow Head
 Norris Point
 Port au Choix
 St. Barbe
 L'Anse au Loup
 St. Anthony

Leg 4 - Labrador

St. Anthony (Gateway)
 L'Anse au Loup
 Red Bay
 Battle Harbour
 Cartwright
 Happy Valley - Goose Bay
 And North

3.2 Boating Tourism versus Land-based Tourism

Additional guidance was taken from the provincial tourism product development strategy as outlined in the 2004 study, *A Special Place, A Special People, The Future of Newfoundland and Labrador Tourism*. The intent was to achieve where possible a best fit with the identified destination and tourism growth areas in the province, specifically these designated as Tier 1 and Tier 2 areas, while satisfying the needs of boaters with respect to safe harbours along our coasts. This approach takes advantage of and builds on existing land-based tourism infrastructure in the province.

A major consideration that shaped the approach to this study was the recognition that, although the recreational boating tourist has much in common with the land-based tourist, there are also differences peculiar to the requirements of recreational boaters that make their needs unique. Care should be taken not to confuse the recreational boating tourist as another variant of the land-based tourist. For example:

- a. Whereas the land-based tourist is confined to a road system and the points of interest along the way, the recreational boating tourist has no such restriction. For a boater the ocean is the highway and it is largely the boater's choice in which direction the boat will be sailed, at which ports stops will be made and how far along the coast a cruise may go.
- b. The traveling time frame differs as well, as a boater on a coastal cruise, allowing for weather conditions, will have a target port (with emergency alternative ports) as a destination on his/her marine charts. In the case of a sailboat this may mean a day's sail of ten hours to cover 50 nautical miles (100 km) at 5 knots an hour (10 k/hr). For a power boat, and assuming a 10 knot speed, this would double the distance travelled (200 km) in the same time frame.
- c. The recreational boater need that is paramount above all other needs is a safe and secure harbour, protected from winds and wave, whether that means being tied to a dock in an established port or anchored in a remote harbour.

3.3 Marina Strategy Study Process

The following table outlines the steps and the resulting outcomes and findings relative to the Study Process. The process is elaborated in the document.

Marina Strategy Study Process	
STEPS	OUTCOMES/FINDINGS
<p>Step 1: Existing Marina Capacity (List of Ports)</p> <ul style="list-style-type: none"> • ACOA / INTRD Sites • Small Crafts Harbours Sites • Study Team Sites 	<p>List of potential ports of call in NL.</p>
<p>Step 2: Informal Evaluation and Market Analysis</p> <p>Key Informants:</p> <ul style="list-style-type: none"> • Small Crafts Harbours and Harbours Staff. • NL Government Officials and ACOA account representatives. • NL Tourism Product Development Strategy. • Review of relevant studies. • Team knowledge. 	<ul style="list-style-type: none"> • Many harbours were developed initially to support fishery. • Level of amenity is inconsistent. • No detailed records of visitors kept. • Ports next to populated areas are over capacity. • Ability to expand is limited by water depth and not all ports are deep enough to handle larger, mega-yachts. • Highest return on investment if: <ul style="list-style-type: none"> ○ Linked to land-based tourism product. ○ Concept of home porting explored. ○ Focus on extended stay and repeat visit. ○ Large cruisers 50' plus represent highest yield.
<p>Step 3: Sail Time Analysis</p> <ul style="list-style-type: none"> • GIS-based inventory. • Based on 1 day – 10 hour sail-time • Assumed circumnavigation of NL. • Identified intersecting ports of call. 	<ul style="list-style-type: none"> • Identified initial list of strategically located ports. • Cross-referenced ports with Tier 1 & 2 land-based product development areas. • Confirmed viability provided basis for island-round cruise concept. • Identified initial gaps in port allocation to support island-round and coastal Labrador tour.
<p>Step 4: Site Visits, Consultations, and Markets</p> <p>Site Visits:</p> <ul style="list-style-type: none"> • 81 ports of call visited. • General Observations which included recognition of: <ul style="list-style-type: none"> ○ Capacity ○ Market readiness ○ Quality ○ Tourist amenity <p>Consultations:</p> <ul style="list-style-type: none"> • Visits to and/or meetings on-site; • Telephone consultations; • Email; and, • Group meetings. 	<p>Rationalizes list of strategic port locations and development potential.</p>

Marina Strategy Study Process	
STEPS	OUTCOMES/FINDINGS
<p>Markets:</p> <ul style="list-style-type: none"> • NL perceived as an exotic blue water cruising destination. • Exploration adventure requires pre-planning. • Most national and international boaters are sailing, but more power boaters coming. • Informal information from port operators indicated national and international boating market increasing. • Home porting of large cruisers is increasing; some are circumnavigating NL over 3 years. 	
<p>Step 5: Concept Development</p> <p>Circumnavigation tour of Newfoundland and coast of Labrador in 4 legs.</p> <ul style="list-style-type: none"> • Integrate marinas, sail time, assessment of existing conditions, consultations, and markets to generate final 'strategic location' port list. • Suggest level of development. • Propose touring routes and marine based tourism destination areas. 	<ul style="list-style-type: none"> • Identify home ports in close proximity to population to enhance economic viability. • Integrate with Tier 1 & 2 provincial land-based tourism product development areas. • Develop day tours from home ports. • Focus on overwintering capacity and enhanced economic return. • Develop national and international gateway ports and enhance profile. • Rationalize ports and port needs based on Levels 1-3 scale of development. • Suggest level of development and visitor needs at each level.
<p>Step 6: Prioritize</p> <p>Identify marina development priorities:</p> <ul style="list-style-type: none"> • Priority 1: <ul style="list-style-type: none"> ○ Develop home ports. ○ Develop national and international gateways. ○ Promote NL in cruising guides. ○ Focus on circumnavigation of NL and home-porting. ○ Develop marina sector under HNL umbrella. • Priority 2: <ul style="list-style-type: none"> ○ Where there are gaps in routes and local support develop Level 2 & 3 ports. • Priority 3: <ul style="list-style-type: none"> ○ Develop 'Tour NL' boating brand. ○ Market as an exotic, full-service destination. ○ Develop cruising guide. 	<ul style="list-style-type: none"> • Focus on enhancing existing infrastructure. • Much of the infrastructure for Marine Tier 2 and 3 is in place. • Ability to modify existing fisheries infrastructure exists. (e.g., add floating docks)

Marina Strategy Study Process	
STEPS	OUTCOMES/FINDINGS
<p>Step 7: Implementation/Evaluation Tool</p> <p>Applications for development requirements.</p> <ol style="list-style-type: none"> 1. Marina Master Plan <ul style="list-style-type: none"> o Program development o Functional planning o Design plan o Business case o Governance/ Partnership Model 2. Marina Level of Development Evaluation Tool <ul style="list-style-type: none"> o L1 o L2 o L3 o Home port o Gateway port 	<ul style="list-style-type: none"> • Applicant has primary role in submitting application. • Identifies economic spin-off from marina development. • Ensures future management and maintenance requirements are met.

4.0 RECREATIONAL BOATING MARKET OVERVIEW

4.1 Land-based Tourist Destination Areas

The Newfoundland and Labrador tourism product development strategy of 2004, *A Special Place, A Special People*, identified three levels or tiers for land-based tourism, based on the ability of regions to provide amenities and attractions for tourist. Tier 1 areas have an east, west and north geographical representation on the island portion of the province and includes the St. John's area, the Trinity – Port Rexton nexus in the east, Gros Morne in the west, and St. Anthony - L'Anse aux Meadows in the north. Tier 2 areas do not quite meet the same criteria for land-based tourism but offer excellent potential for future development. Tier 3 areas are even lower down on the scale but still offer some possibilities for tourism development.

We recognized a tremendous utility in adopting and integrating the tier system in the marina strategy approach and used it to tier our own analysis as it applies to prioritizing recreational boating areas in NL.

4.2 Recreational Boating Market

There is a major challenge to quantifying the extent of the boating market potential, as little visitor data is being collected on port visits by out-of-province recreational boaters. What information is available on visitation is anecdotal, in that the people who administer the ports will report verbally that a “certain number of sailboats from generally Canada, the United States, or Europe, came through last summer”. As to where these boats came from or what is their port of registration is equally vague. It does, however, point to a shortcoming of how visiting boats are processed in the various ports. Such information as boat size, port of origin, type of boat, number of crew previous and next port is not recorded.

One possible source of information on international recreational boaters entering Newfoundland is through Canadian Border Services Agency; however, this information is

protected under Canada's privacy laws and is not readily released. This source may have further complications in attempting to obtain solid data on the number of recreational boats transiting Newfoundland waters: recreational boats coming from the northeast coast of the United States may first clear customs in Nova Scotia prior to moving on to Newfoundland. In addition, the use of CANPASS permits a visiting recreational boat from the United States to declare entry at any time up to four hours of their estimated time of arrival in Canada. Indeed, given the length and geography of our coastline and the sparseness of settled areas, it is highly conceivable that a portion of foreign recreational craft may never register through customs during a summer visit.

Without doubt, the immediate market for recreational boating is the local resident market, which is supported by the growth of recreational boating and the demand for increased capacity from many communities. The Lewisporte marina is a prime example of the growth of recreational boating in NL and the need for expanded capacity to accommodate the local demand, without consideration of the needs of non-resident boating visitors. Unlike Lewisporte, Bonavista, as a Harbour Authority managed harbour, has a primary mandate to serve its commercial users; however, it does accommodate visiting recreational boaters by reserving berth space on its floating docks.

The Harbour Authority Supervisor in Bonavista has kept some statistics on visiting recreational boats and, in comparing the years from 2004 and 2006, we do see some trends. Albeit this is a small sample, and is not necessarily indicative of all marinas in the province, it never-the-less points to a pattern of growth. Of significance is that the number of non-resident boat visitations has almost doubled in the three year period 2004-2006, with most boats coming from the United States. This does suggest that there is an emerging non-resident market that may have the potential for significant growth with appropriate investment in marketing and marinas. However, a critical requirement and a necessary precursor for the growth of a non-resident recreational boating tourist industry is the development of potentially viable, self-sustaining local marinas.

Bonavista Visitation Growth			
	2004	2005	2006
Non-resident			
United Kingdom	3	4	5
United States	8	11	12
Other	1	2	3

Canada	4	7	9
Sub-total	16	24	29
Newfoundland	29	33	33
Total	45	57	62

The Recreational Marine Activity and Marina Development Study, 1992, although dated, offers some insights to the number of foreign cruising boats visiting NL.¹

Foreign Cruising Boats Visiting Newfoundland			
Harbour	1991	1990	1989
St. John's	35	33	30
Moreton's Harbour	10	8	5
Lewisporte	30	28	25
Port aux Basques	100	95	92
Corner Brook	15	12	10
Burgeo	22	18	17
Fortune	183	140	109
St. Pierre	102	97	95

Notes on Foreign Cruising Boats Visiting Newfoundland Table:

- The majority (80%) of visiting cruising boats are American, New England in particular.
- Many of the boats counted in various harbours are the same boat which have made more than one port of call and have undoubtedly been included in the counts for different places.
- The numbers are increasing.
- The numbers at Fortune are inflated due to the same local boats clearing Customs several times a season. The actual numbers are probably comparable to St. Pierre.
- The majority of American boats enter Canada in Nova Scotia. Therefore, the numbers provided by the various Canada Customs offices in NL are most likely understated as they only represent the foreign cruising boats which check in at the local Customs offices as a courtesy.

¹ Contents on pages 14-16, adopted from the *Recreational Marine Activities and Marina Development Study - 1992*.

Mr. Sandy Weld, Editor of The Cruising Club of America's CRUISING GUIDE TO NEWFOUNDLAND, writes in his preface to the 1992 edition:

"... the coast of Newfoundland is a hospitable coast: it is not a dangerous area with sorts of hazards to trap the unwary. True, it is no place for the novice or timid. It is full of unexpected delights for the experienced sailor. It is well away from crowded harbours, where one might not see another yacht in a week's time. Perhaps the most rewarding part of a cruise to Newfoundland is meeting the people, particularly those from remote villages. They are generally reserved, with a dry sense of humour and a quick willingness to help."

Another publication, the "WORLD CRUISING HANDBOOK", written by Mr. Jimmy Cornell, himself as an accomplished cruising sailor, offers further insight into why Newfoundland is considered to be an attractive destination for cruisers:

"For the decreasing number of yachts who take the northern route across the Atlantic, the island of Newfoundland, closest point to Europe, is their landfall or springboard. Cruising this northern island is strictly for summer months and even then it can be cold, wet and windy at times. The rewards are a vast choice of anchorages in small bays, harbours and islands, and the few cruising boats sailing this far north can find complete isolation in beautiful surroundings."

Mr. Bill Robinson, a former editor of Yachting, is the author of the "BEST SAILING SPOTS WORLDWIDE", and he rated the coast of Newfoundland as second only to the Pacific Northwest, of twenty notable cruising grounds in the world. When he visited the coast of NL in July 1987, during a Cruising Club of American / Royal Newfoundland Yacht Club cruise in company, he was particularly taken with the isolation of the anchorages, and the abandoned out-ports he visited, not to mention the scenic beauty and wildlife. The friendliness and kindness of the children in the fishing communities, who gave them freshly caught cod, and who refused to accept any payment, also made a big impression. This is in contrast to the anchorages in the Caribbean where the locals pester cruisers in a floating version of pan-handling.

Mr. Robinson also remarked that many of the 35 American boats which travelled to Newfoundland for this flotilla cruise would later be left for winter storage at Baddeck, on the Bras d'Or Lakes, where there is a major boat yard with all services and good facilities for taking care of visiting boats.

It is evident of the last comment that Newfoundland is not considered to possess a suitable facility for serving cruising boats, despite its excellent cruising potential. The ability to provide service to these boats would not only provide a convenience to the visitor and revenue to NL boat yards, but would also keep that visitor in NL for possible one or more cruising seasons, rather than lose that business to boat yards in Nova Scotia. Once the visiting boat has left NL shores, it's doubly difficult to get back due to the logistics of weather, distances, and expense.

4.3 Observations on International Markets

1. Number of Boats

There are a very large number of pleasure boats, power and sail, being kept in international marinas. (The National Marine Manufacturers Association's latest edition, '2005 U.S. Recreational Boats Registration Statistics', gives the number of boats registered in the U.S. as 12,942,412, a number of which are kept at marinas. The marinas in the Mediterranean and the Caribbean list between them approximately 256 marinas with approximately 51,000 boats, most of which are not owned by local residents. The boat size is increasing with average length being 40-50 feet. There are also a large number of larger boats, both private and charter, sizes up to 150', with crews from 2 to 20 people. The numbers of these are in the thousands.

2. Use Patterns

Smaller and private boats tend to be kept in one location, or move every few years. The boats are generally kept in the water year-round in suitable climates (i.e., Mediterranean) or else stored on land for 6 to 8 months – Caribbean and NE USA. In both cases they are only actually used for short periods of time – in season. Most of the boats in the Mediterranean and Caribbean have made significant passages to get there. These boats generate year-round income for the marinas

while they are stored, through storage, haul out, and maintenance and storage fees.

The larger boats may be used with the same pattern, or may be moved to the Caribbean in the fall and back to the Mediterranean or NE USA in the spring. They spend a lot of time laid up in marinas waiting for owners, but having continuous maintenance.

Boats of all sizes are used for 4 months maximum in the Mediterranean, (June through September) and 5 months maximum in the Caribbean, (December through April).

3. Current situation in the Mediterranean and Caribbean

- Marinas and storage areas in the Mediterranean and Caribbean are becoming crowded and expensive.
- Security at both the international and local level is an increasing concern.
- Extreme weather patterns are a concern.

4. Potential in Newfoundland and Labrador

During our consultations and following discussion with boaters who use the Caribbean, it was suggested that NL could over time potentially become an attractive destination for both cruising and/or long term storage for many of these boats:

- It is an attractive place, often perceived as an exotic destination.
- Many people are looking for alternatives, and our province is a 'new' destination.
- The season, June through September, would mesh with the Caribbean in the winter use patterns for larger boats.
- Air transportation is better than most of the Caribbean.
- There are fewer security concerns.
- Professional, large scale maintenance and storage facilities can be easily developed in NL using existing fishery-related marine storage/repair infrastructure.

5.0 ANALYSIS AND FINDINGS

Our analysis was based on information collected in the field and several other factors. One of the primary factors was the recognized needs of recreational boating cruisers. The identification of these 'needs' is given in more detail in the marina inventory list or assessment matrix. The most critical needs are:

- a. A safe port or anchorage, preferably within a day's sail.
- b. A source of potable water and perhaps food supplies.
- c. Access to hydro power, preferably at the dock.
- d. Access to fuel and mechanical services.

5.1 Existing Marina Capacity

Atlantic Canada Opportunities Agency and NL Innovation, Trade and Rural Development provided the consultants with a list of ports that should be visited as part of the assessment. The consultant team also added several ports of calls for consideration as three of our team members are avid provincial sailors and one of these three has sailed extensively and visited many national and international ports.

As well, both ACOA and INTRD provided the consultants with a listing of key stakeholders and federal / provincial representatives who should be consulted as part of the assessment.

Prior to conducting site visits some initial background work was done to gain a more informed understanding of the current situation with respect to capacity in the Province. We called a number of active ports and had sit-down meetings with Small Craft Harbours staff who have expert knowledge of marina conditions in the province.

As well, we did a web-based assessment of marinas in the province, contacted local persons knowledgeable of the industry (e.g., Sail Newfoundland, etc.) and contacted several out-of-province organizations such as the Cruising Club of America, to get an understanding of how cruising in NL is perceived and recognized.

The information from approaches was used as the starting point for evaluating individual marinas against the services and infrastructure available in individual ports.

Generally speaking, the needs of the local, national and international boaters are the same when it comes to infrastructure and level of service. The key difference for the international markets is that European boats use 220-240 AC as opposed to 120 AC. Propane hook-ups may also be different. The biggest issue may be transportation to an airport, for those who overwinter. Generally, this is accommodated in pre-planning a trip.

5.2 Informal Evaluation and Economic Sustainability

Based generally on response from Key Informants that included Small Craft Harbours, NL Government Officials, ACOA Account Representatives plus a review of the Newfoundland Tourism Product Development Strategy and relevant studies, we were able to ascertain the following:

A. Infrastructure:

1. Much of the infrastructure currently used to support marina development has evolved from the fishery.
2. A number of marine services facilities that were established to support the fishery are currently looking for alternative markets given the general uncertainty and disruption in the fishery.
3. These facilities could readily be retrofitted to support laydown and storage and marine servicing. A key asset that many have is a travel lift. A number of lifts with 150 tonne capacity exist in the province.
4. Many marinas are overcapacity because the original design for the marina did not take into account future expansion needs. A key to future expansion is the placement of the breakwater. Many marinas have breakwaters placed inappropriately and this has restricted the ability to expand. Retrofitting to increase capacity is very expensive.
5. Currently, no formal design process is followed for marina development that includes a design program related to market and market needs. Many marinas are simply engineered, resulting in an industrial look, limited opportunity for

diversification as it relates to economic development and the aesthetic quality and associated shore-based and water front amenities are not well developed.

6. Although no formal information exists, it is evident that there are a small number of international boaters overwintering in NL ports.
7. In a number of marinas, such as Bonavista, Foxtrap and Twillingate, commercial fishing boats are sharing facilities with recreational boaters.
8. The level of amenity found in most NL marinas is below par when compared to other marinas destinations in the world. Full service marinas need to become destinations in themselves. Probably the closest we have to full-service marina are the Royal Newfoundland Yacht Club in Conception Bay South and the Lewisporte Marina, Lewisporte.

B. Market Needs

1. During our consultations we encountered several boaters who had circumnavigated Newfoundland and others who had explored coastal Labrador, they raved about their experiences. Generally these sailors related stories of whales, reefs, shoals and spectacular scenery. All, however, were challenged by the unavailability of services to support marine touring in NL.

One local doctor in Bonne Bay who has sailed the NL coast, and now docks his boat in Barcelona, encapsulated these general comments best when he offered that:

“ the coast is beautiful but it has lots of reefs and shoals, so you need good charts and you need more services for mariners the best marinas in the province are only at about 60% of what they need to be to compete internationally boaters like the red carpet when they dock, they need and will pay for a high level of service if you want to attract this market you must have international quality services”.

2. A major drawback in confirming market and boater origins is the fact that few records of national and international boaters are kept. That being said, many we spoke to suggested that international boaters regularly visit their marinas.

3. We spoke to the marina staff in Baddeck, NS, who told us that a number of boaters pass through their marinas to refuel and get supplies on the way to NL. Unfortunately, they keep no records and could not tell us where they came from or where they were going. We were also told that, as no home porting services were available in NL, some of these boaters return from NL in the fall leave their boats in Cape Breton and sail back to NL in the spring.
4. The local resident market is very active. In fact, all provincial marinas that exist in close proximity to population centres currently have waiting lists.

C. Return on Investment

1. Interviews with boaters and mariners who understand the markets and sail extensively confirmed that the economic impact of boaters is limited; the sailing market is self-contained and has little direct economic impact.
2. Power boaters over 55' potentially represent the greatest potential market relative to yield. These boaters buy lots of fuel and associated goods and services and will take part in land-based activities. Many, for example, like to fish and camp. A number actually carry kayaks with them and use their boat as a base for such an activity.
3. The concept of home-porting garners the greatest economic return, just as is seen in the cruise ship market. In home porting the boat owner leaves the vessel in NL and flies back and forth to the province. The home port charges a winter storage fee and provides needed marine servicing to the vessel.
4. The focus needs to be on developing a concept that supports home porting, extended stays and repeat visits. It is relatively less expensive to attract repeat customers than to consistently attract new ones.

D. Primary Tour Concept – Circumnavigating Island of Newfoundland and Coastal Labrador Cruise.

In most recreational activities the motivations and impetus as to why people take part in any specific activity is varied and mixed and it is no different for people involved in recreational boating. However, the recreational boating cruiser generally plans out his / her cruising season and the farther the cruise is from the originating port the more planning and preparation is called for. The goal is not necessarily completing the cruise and arriving at some distant port, but the process of undertaking the cruise plays a large role: cruising is not so much about arriving as the process of getting there. Completing circumnavigation is not an absolute goal, but more of a target aim while sailing and exploring a new cruising ground. As you explore circumstances – wind, weather, and tide may also be against you; your boat develops problems; you find lovely anchorages that invite you to stay longer, a multitude of events may happen that may cause you to modify your cruise.

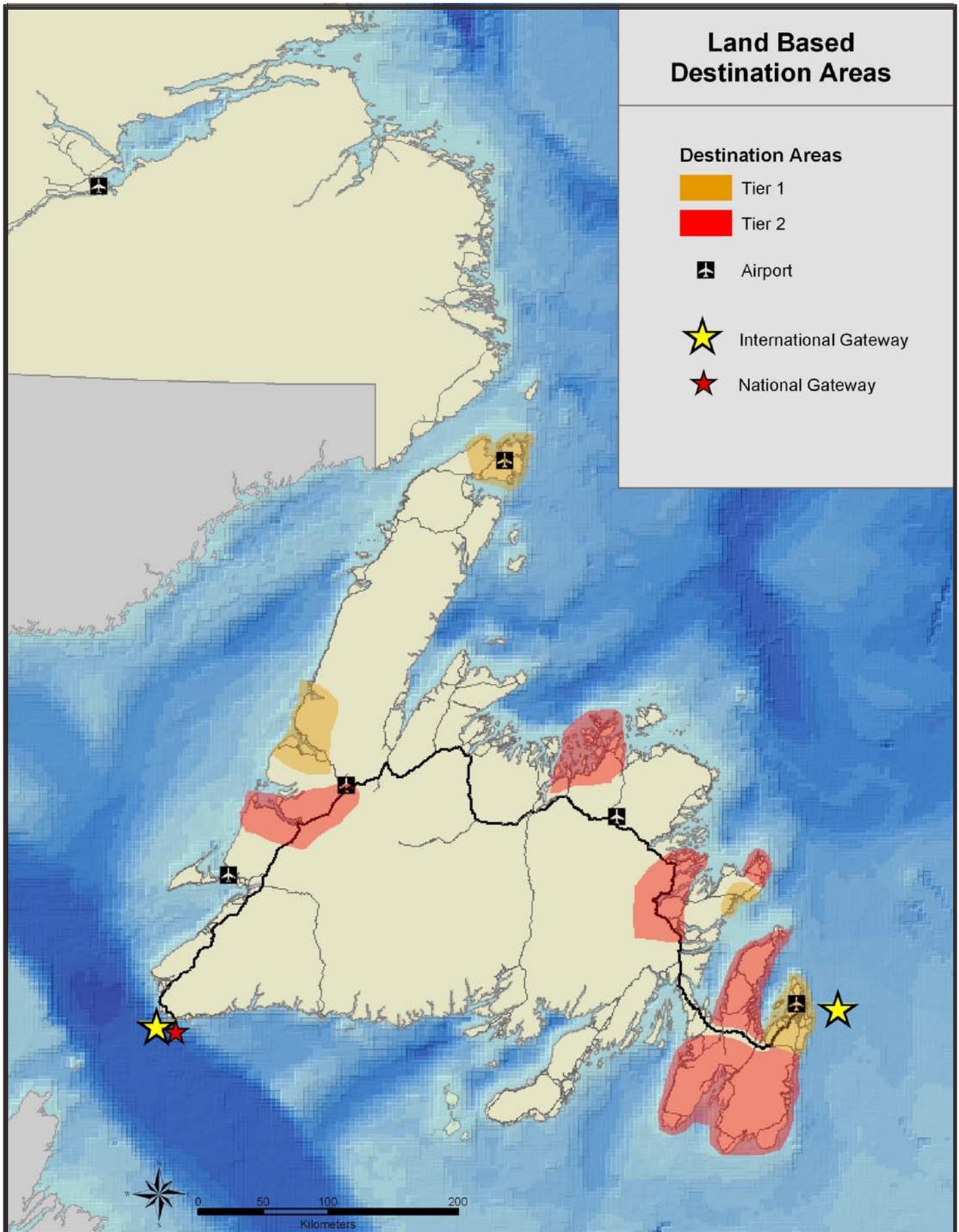
The process being followed in developing the tour concepts is to define three levels of tours as being nestled within each other. The largest, more general tour is the primary tour that involves the circumnavigation of the province, and contains within it the secondary tour, the four tour legs, and the third layer, the tertiary tour.

1. To support the concept of home porting and encourage repeat visitation to the province, we concluded that the concept of circumnavigation provides a number of benefits as it relates to promotion, home porting, repeat visits and advertising.
2. Several countries have introduced the concept of island circumnavigation as a means to link marina assets and integrate surrounding infrastructure.
3. The current circumnavigation tour of Ireland was examined and was considered as an initial model for the conceptual framework for NL. The Ireland tour has proved to be very successful as it links a sail tour of the island with land-based events and activities.
4. In Ireland, following a day sail, boaters are treated to a variety of land-based culinary experiences and local cultural activities and entertainment. The visitor

can package a tour to include specific legs, themes, or the entire tour of the island.

5. In NL we know of mariners who have sailed the entire island and coastal Labrador. This tour usually takes three to four years and necessitates over-wintering of the boat along the way, thereby supporting the concept of homeporting, and supporting economic development via winter storage and marine services.
6. In Ireland a secondary tour, circumnavigating the island via kayak, has been developed. While this concept for NL would certainly be seen as extreme we have already had adventurers traversing the island, and exploring parts of the island's coast and coastal Labrador.
7. The concept of circumnavigation provides opportunities for related special activities and events, such as a round-island race. This being the case, integrating the touring concept with Tier I and Tier II Tourism Product Development Areas identified by the Province provides an opportunity to link marina-based tourism with land-based tourism (see Figure 2 - Land Based Tourism Development Areas).
8. A circumnavigation tour also supports the development of shore-based activities and services, either at marinas or in communities in close proximity to them.
9. A circumnavigation tour also becomes an organizing principle for the study, a means to rationalize the location and suggested development of ports to support the concept.
10. Critical to the success of a circumnavigation tour will be a new and updated cruising guide for NL. The recently completed Cruising Guide for Lewisporte could be a starting point for a comprehensive guide for the Province.

Figure 2



	Box 504 St. John's, NL Canada A1C 5K4 T 709.738.2500 F 709.738.2499		prepared for project 	component NL Marina Strategy Land Based Destination Areas	date September 2007
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E. Secondary Tour Concept.

Whereas the Primary Tour Concept develops an idea of a circumnavigation of the island portion of NL, it may be marketed as an attraction and accomplishment in itself. Whether it is a once a year or multi-year undertaking, with the multi-year option being preferable due to its greater return to marina tourism, the recreational boater can be offered other options. Not every boater may wish to circumnavigate the island or travel north to Labrador; however, they may wish to explore sections of the NL coast.

The secondary tour concept represents the division of the primary tour concept into four logical and strategic legs. The legs can constitute tours in themselves but they leave the recreational boater with an option to carry on or terminate at some pre-planned point.

Leg 1 – West Coast-Southern Labrador: Port aux Basques to St. Anthony.

Leg 2 – Northeast-East Coast: Holyrood to St. Anthony.

Leg 3 – South Coast: Port aux Basques to St. John's.

Leg 4 – Coastal Labrador: St. Anthony to Happy Valley Goose Bay (with potential link to Nain and the Torngats).

The legs also acknowledge where visiting recreational boaters first enter Newfoundland waters. Port aux Basques is the Gateway for recreational boats arriving from the United States and from Upper Canada. (The reference to 'Gateway' will be covered in more detail in section 6.) As such, it is the entry port for the start of two legs, and boaters have the choice of Leg 1 which will take boaters up the west coast and even to the Leg 4 or Labrador if they wish. Port aux Basques also serves as the gateway for Leg 3, which would see recreational boaters travelling along the south coast and St. Pierre, as far as St. John's.

European recreational boaters who take the northern route from Europe via Greenland to NL may opt for St. Anthony as a port of entry or Gateway. Depending on the individual boat's sailing plans and ultimate destination, it can take advantage of several legs that can be incorporated into its route. From St. Anthony, a boat can explore the northeast and east coast which is Leg 2. Likewise, boats arriving at

St. John's from Europe also have the option to follow Leg 3 on the south coast or Leg 2 up the northeast coast and further north.

F. Tertiary (Marine Destination) Tour Concept.

Tertiary tours are best described as intra-bay tours or tours that a recreational boater may undertake within a bay. The tours generally are within the marine-based destination area. Normally these would be of shorter duration, involving only a few hours of sail time, that would allow the visiting boater to more thoroughly explore the small harbours, abandon harbours and islands, where they could anchor, tie up to a mooring or old dock for several days.

The northern part of Leg 1, on the West Coast, is the main exception to this tour as there is a long stretch of straight coast on the northern peninsula. Further south there is Bonne Bay and the Bay of Islands. Leg 2, the northeast coast, has several bays that offer excellent cruising and exploring possibilities for the recreational boater. Conception Bay, Trinity Bay, Bonavista Bay, Notre Dame Bay, and to a lesser extent White Bay, are all large, well populated bays that offer a variety of cruising experiences. Leg 3, the South Coast, in addition to having several large bays, Placentia Bay and Fortune Bay, is indented with several long indrafts or fiords available for exploring.

5.3 GIS-based Perimeter Analysis

With the many miles of uninhibited coastline around NL, the frequency of safe ports-of-call and marine service centres is a serious consideration for coastal cruisers. The perimeter analysis undertaken as part of this study identifies areas along the province's coast where such services should be found. The analysis revealed that generally the distance between service areas is not extreme; the prudent cruiser could plan in advance, and note on his marine charts / log where such facilities are available. The only exception is along the Labrador coast where the distance between service areas is considerable; a prudent cruiser would of necessity include the facilities in his / her route planning.

Procedure

Given the numerous ports of call and the extensive coastline in the province, it became a challenge to organize the marinas and marina information into a logical framework to support strategic planning. It was decided to conduct a perimeter analysis based on a boater circumnavigating the entire Island and including coastal Labrador. While we are not suggesting that all boaters in the province would undertake such an exercise, it did become a logical organizing principle to support our work.

GIS analysis points were randomly selected to be located roughly at the geographic centre of the many bays around the Island and along the Labrador Coast. In areas of straight coast – primarily the Northern Peninsula, portions of the south coast and along the Labrador Straits, areas with active ports were selected.

From each GIS point, radiating lines representing one hour sailing times were established. These points were then used to determine sail / cruise times from bay to bay or point to point in straight coast regions.

These points were then used to determine the intersecting ports based on an applied sail time and sail/ cruising speed.

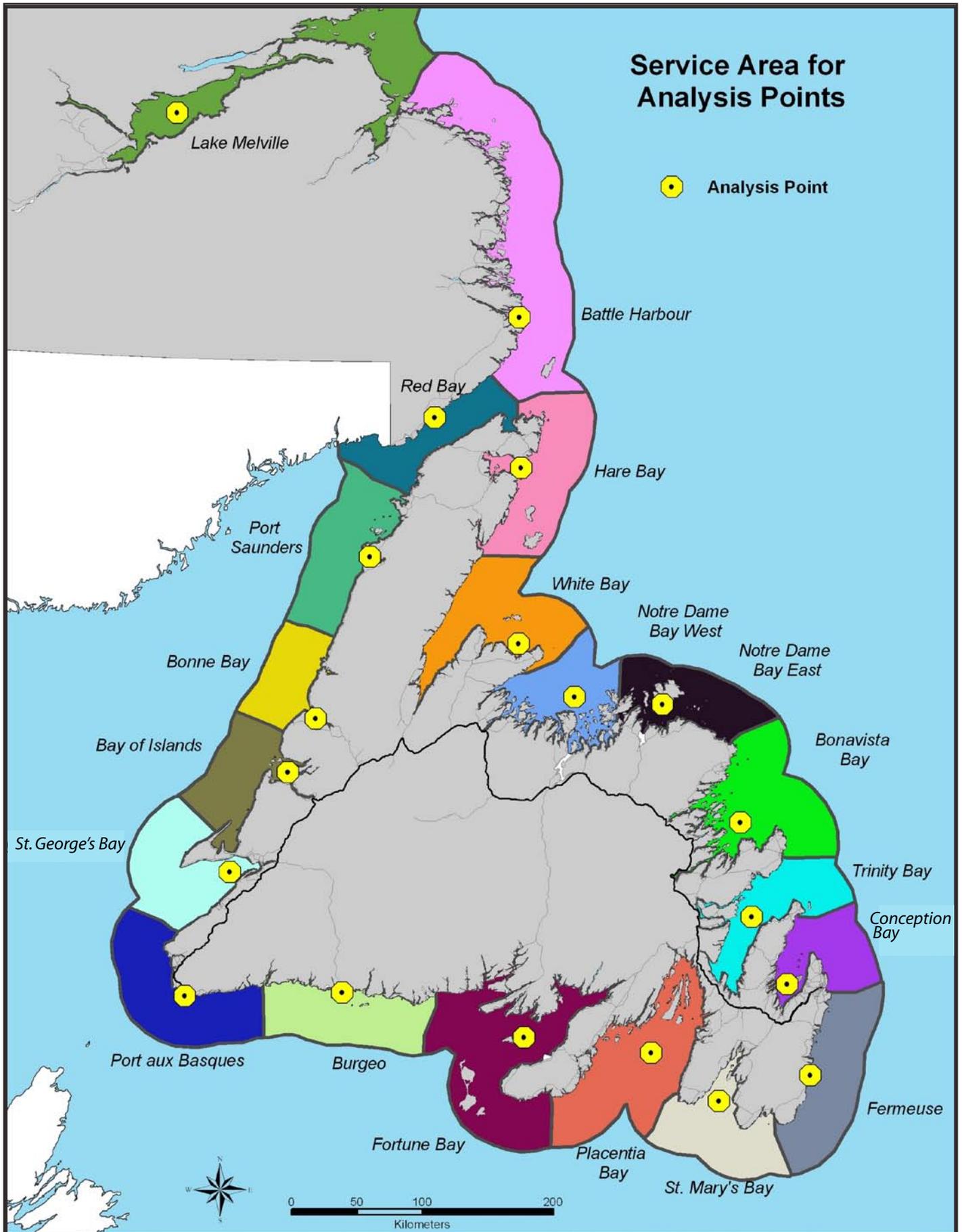
Findings

Generally speaking, the distance between bays and ports of call does allow for a circumnavigation of the Island using existing ports of call.

The five areas of the province where a significant gap exists in ports of call is along the Labrador coast between Port Hope Simpson and Cartwright, and between Cartwright and Happy Valley Goose Bay. A significant drawback to Happy Valley Goose Bay is the significant distance to be travelled from the coast to the town.

Similarly, along the West Coast, gaps exist between Stephenville and Corner Brook. In fact the distance associated with docking in Stephenville could be a detriment to boaters. Similarly, a gap exists between Norris Point to Port Saunders and Port Saunders to St. Anthony. This is not to say that ports of calls cannot be developed along this coast, but opportunities to develop full-service marinas are certainly limited (see Figure 3 - Service Area for Analysis Points).

Figure 3



	Box 504 St. John's, NL Canada A1C 5K4 T 709.738.2500 F 709.738.2499		prepared for 	project NL Marina Strategy	component Service Area for Analysis Points	date September 2007
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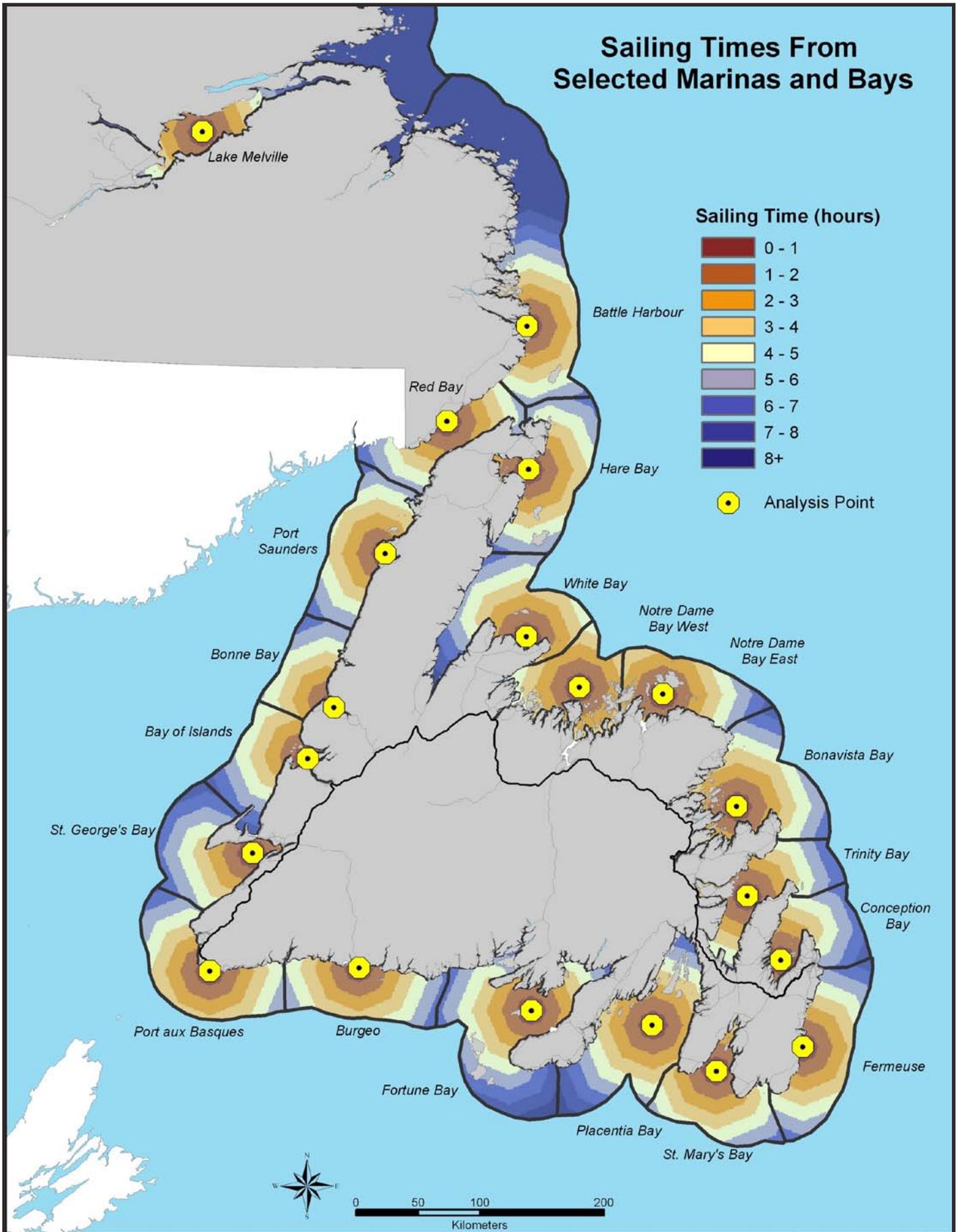
5.4 Sail Time Analysis

The time / distance analysis conducted as part of the perimeter analysis was critical for establishing an estimate of distance travelled in a day's sail of 8 to 10 hours' duration. As noted, we made the assumption that a sailboat will travel at 5 knots and a power boat at 10 knots over an 8 to 10 hour day. We utilized a GIS-based time / distance perimeter analysis and a sail / cruise time analysis around the province to determine reasonable distances travelled between ports in a day of 8 to 10 hours on the water. There were two important outcomes of the time / distance assessment:

- a. It identifies potential harbours that could be used by cruisers as destination points as they make their way along the coast.
- b. It has implications for the level of marina development that might be desirable in a specific port or community.

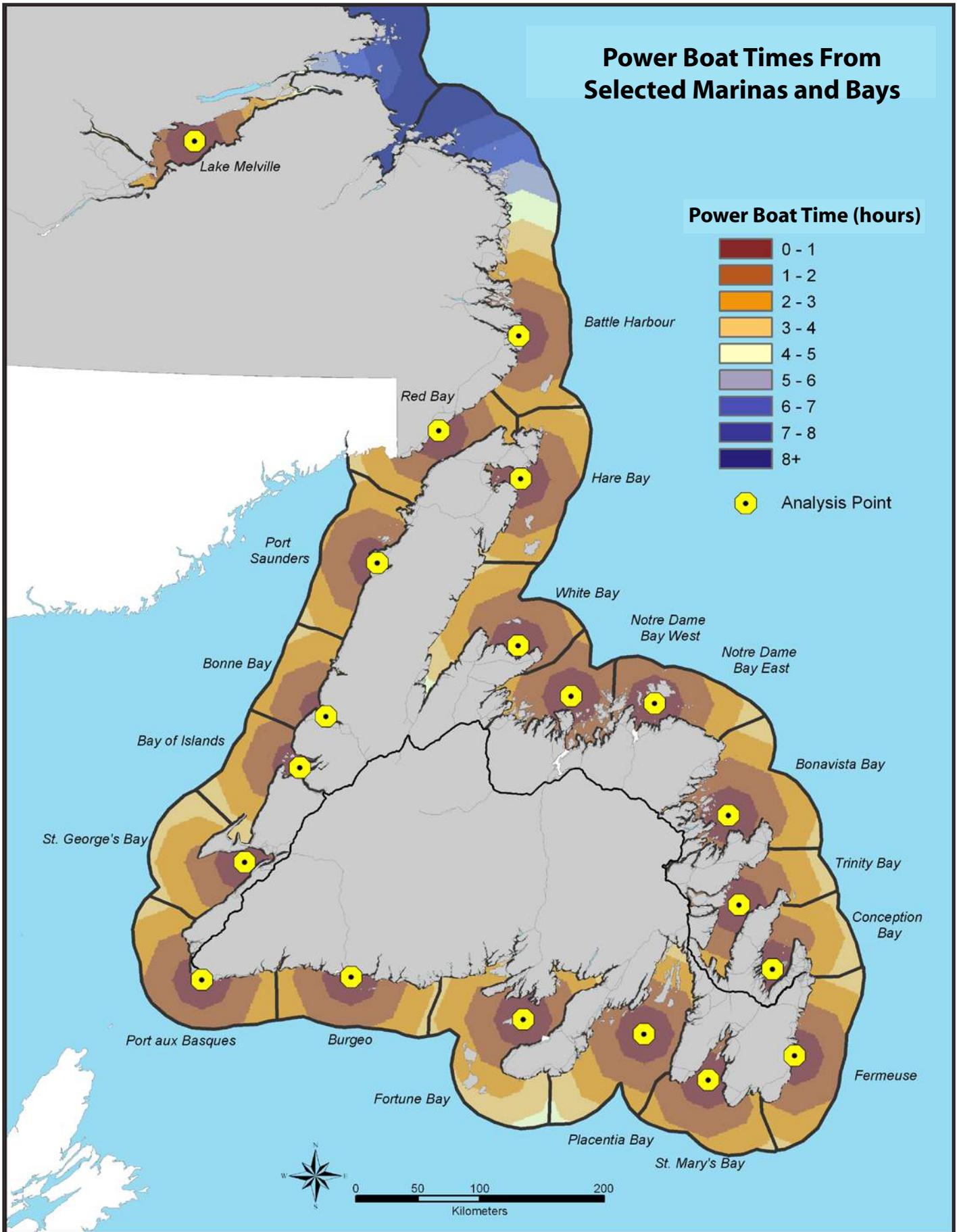
(See Figure 4 - Sailing Times from Selected Marinas and Bays, and Figure 5 - Power Boat Times from Selected Marinas and Bays.)

Figure 4



	Box 504 St. John's, NL Canada A1C 5K4 T 709.738.2500 F 709.738.2499		prepared for  Newfoundland Labrador	project NL Marina Strategy	component Sailing Times from Selected Marinas and Bays	date September 2007
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Figure 5



 <p>Box 504 St. John's, NL Canada A1C 5K4 T 709.738.2500 F 709.738.2499</p>		<p>prepared for</p>  <p>Canada Newfoundland Labrador</p>	<p>project</p> <p>NL Marina Strategy</p>	<p>component</p> <p>Power Boat Times from Selected Marinas and Bays</p>	<p>date</p> <p>September 2007</p>
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5.5 Marina Site Visits and Consultations

A. Site Visits / Consultations and Meetings

Site Visits – over eighty ports of call were visited by the study team. The focus of these visits was to assess existing infrastructure, identify current capacity and potential opportunities for expansion or upgrading.

The reader should bear in mind that, given the budget and time constraints, it was impractical for the study team to meet with individuals at each port of call. We did attempt, where practical and feasible, to meet with officials involved in marina development in their community.

In Lewisporte, a meeting was held with community representatives from Notre Dame Bay. In Corner Brook, a short meeting was held with the local marina organizations and in Port aux Basque a meeting was held with the Town manager to review plans they have for marina development.

In some instances consultations were held over the phone and email submissions were encouraged. The work also included consultations with government officials identified by ACOA and INTRD.

Time and budgetary constraints meant that a site visit to the south coast, of the Island was not practical. As well, we only visited as far north as Happy Valley - Goose Bay.

Members of our study team were, however, quite familiar with the south coast having both sailed in the area and visited numerous ports of call as components of past studies.

B. Inventory Process

To support the physical inventory digital images of each port of call and associated marine based infrastructure were taken. Notes specific to each site were compiled with the focus being on: capacity, market readiness, quality and tourist amenity, existing infrastructure, and quality of marina amenities (see Appendix C – Marina Inventory – for imagery and notes for all ports visited and consulted).

(See Figure 6 – List of ports visited and consulted, including those listed by ACOA)

Figure 6 - List of Ports Visited and Consulted, including those Listed by ACOA

	ACOA	ACOA Appl	Site visit	Consulted
Admiral's Beach			✓	
Argentia			✓	
Arnolds Cove	✓		✓	
Baine Harbour	✓		✓	
Battle Harbour			✓	
Bay Bulls	✓		✓	
Bay de Verde			✓	
Bay Roberts			✓	
Bonavista			✓	✓
Botwood	✓		✓	✓
Branch			✓	
Brigus			✓	
Carbonear			✓	
Carmanville			✓	
Catalina			✓	✓
Clareville	✓		✓	✓
Corner Brook (BIYC)	✓	✓	✓	✓
Conne River	✓			
Deep Cove	✓	✓	✓	
Deer Lake	✓		✓	
Dildo			✓	
Dunville	✓		✓	✓
Durrell			✓	
Embree			✓	✓
Englee			✓	
Fermeuse			✓	
Fogo	✓			✓
Fortune	✓		✓	✓
Foxtrap			✓	
Francois			✓	
Glovertown	✓	✓	✓	✓
Grand Bruit	✓			
Grand Bank			✓	
Greenspond			✓	
Happy Val/Goose B	✓		✓	
Harbour Breton	✓		✓	
Harbour Grace			✓	
Hearts Content			✓	
Heart's Del /Isling'n	✓	✓	✓	✓
Herring Neck			✓	
Hodge's Cove			✓	
Holyrood	✓	✓	✓	✓
Kings Point	✓		✓	

	ACOA	ACOA Appl	Site visit	Consulted
La Scie			✓	
L'Anse au Loup			✓	
Leading Ticks			✓	✓
Lewisporte			✓	✓
Long Cove			✓	✓
Long Harbour	✓		✓	✓
Lumsden			✓	✓
Mount Arlington Heights			✓	
Mount Carmel	✓		✓	✓
Musgrave Harbour			✓	
Musgravetown	✓		✓	✓
Norris Arm	✓		✓	
Norris Point	✓	✓	✓	✓
O'Donnell's			✓	
Old Perlican			✓	
Petley	✓		✓	✓
Point Leamington			✓	
Portugal Cove South			✓	
Port au Choix			✓	
Port aux Basques	✓	✓	✓	✓
Port Blandford	✓		✓	
Port de Grave			✓	
Port Kirwan			✓	
Port Union	✓		✓	✓
Ramea	✓			✓
Red Bay			✓	
Renews			✓	
Riverhead			✓	
Salton's Brook			✓	
Springdale	✓		✓	
St. Albans	✓		✓	
St. Anthony			✓	✓
St. Joseph's			✓	✓
St. Barbe			✓	
St. Bride's			✓	✓
St. Mary's	✓		✓	✓
Summerside	✓		✓	✓
Trepassey			✓	
Trinity			✓	✓
Triton	✓		✓	✓
Twillingate			✓	✓
Valleyfield	✓		✓	✓
Wesleyville	✓		✓	✓
Winterton	✓	✓	✓	

C. Findings

The marina assessment tool / framework focused primarily on the marina facilities available to recreational boats in selected harbours indicated from the cruise time / distance assessment. As one would expect, the marina facilities ranged from excellent to poor and frequently reflected the level of commercial fishing activity in the community harbour. For most communities the 'government wharf' is the main wharf and the only public wharf in the harbour that can be used by visiting pleasure craft. These wharves are government-designed and built, and are heavily constructed structures built to service the commercial fishing industry and coastal freighters. Maintenance of these docks is the responsibility of Small Craft Harbours (SCH) in conjunction with the Harbour Authority in the area. However, as a consequence of the Cod Moratorium and changes in the fishing industry away from the mainstay cod fishery, the use and need of a government wharf has diminished considerably in many communities.

Conscious of its own budget limitations, SCH has a policy to devolve wharves that are not actively involved with the fishing industry to other parties. In some instances, where there is no third party interested in taking over responsibility for the wharf, SCH has destroyed the structures, which would deteriorate over time and become a safety hazard and liability.

For the small boat component of the fishing industry, SCH has been using floating docks rather than fixed docks or wharves. For many harbours, wooden floating docks linked to fixed breastwork or a marginal dock are becoming the norm. They are quite popular, as a boat attached to a floating dock not only rises and falls with the tide, but the challenges of boarding the boat are reduced considerably.

Although SCH is responsible for many of our harbours in Newfoundland, the division has a divestiture policy in place with respect to recreational harbours. It is significant that many of the funding requests for marina work received by ACOA come from SCH-managed harbours. The cooperation and continuing participation of SCH not only in recreational boating but in a nascent recreational boating tourism industry is critical especially in smaller communities where resources are limited but the benefits could be considerable. (See Appendix B – Sample Marina Assessment Form)

Findings: Marina Site Visits and Consultations

<p>Capacity</p>	<ul style="list-style-type: none"> • Marinas adjacent to populated areas, and generally supported by the resident market, are at capacity. (Examples: Lewisporte, Bay of Islands, Holyrood, Foxtrap, Royal NL Yacht Club.) • The ability of these marinas to expand is limited by the location of breakwaters that were not strategically located to maximize build-out when originally designed. • Water depth, in some instances, limits the ability of the marinas to expand. (Example: Bay of Islands and Sunnyside/Irishtown.) • Some ports do not have the water depth to accommodate the growing market for large yachts and powerboats > 55'. • In many instances the recreational marina has been developed based on existing fisheries infrastructure, and the marina and the fishing industry are sharing the same facilities. At times this works well, but at times it creates serious challenges. • With the down turn in the fishery many marine service facilities are looking to diversify – for example, Durrell, Triton. The recreational boating market can support this opportunity, particularly if the concept of home-porting is developed. • In many harbours and bays the marine services and the marina are separated. Given the short geographic distance between them, opportunities exist to develop servicing in one part of the bay and the recreational boating marina in another. (Example: <i>Marina</i>, Norris Point; <i>Marine Services</i>, Glenburnie. <i>Marina</i>, Twillingate; <i>Marine Services</i>, Durrell.)
<p>Markets and Market Readiness</p>	<p><u>Markets:</u></p> <ul style="list-style-type: none"> • NL is viewed as an exotic blue water cruising destination, which was noted from several sources over the years. The following is a listing of articles that confirm this designation: <ul style="list-style-type: none"> ○ Cruising World, June 2002, 'Tracing a circle around Newfoundland'. ○ Sail Magazine, April 2004, 'How we became official Newfies'. ○ Atlantic Boating News, February 1998, 'Cruising NL West Coast'. ○ Blue Water Sailing, August 2006, 'Newfoundland: East by Northeast'. ○ Cruising World, October 2006, 'Hands on Sailor'. ○ Cruising World, March 2007, 'Shoreline'. • Visitors who come to NL need to pre-plan. • Pre-planning is generally supported by a Cruising Guide, hard copy and on-line, that provides needed travel information for mariners. • Lewisporte has a new Cruising Guide for the Bay of Islands that could serve as a basis for a new updated NL guide. These guides need to be updated every 3-4 years or they become obsolete. • The GPS coordinates frequently do not relate accurately to older charts

	<p>and can cause navigation challenges for mariners.</p> <ul style="list-style-type: none"> • Informal conversations with marina operators tell us that national and international boating is increasing, particularly power boating. • Home-porting by large cruisers is increasing, some circumnavigating of NL taking place. • Given the sailing seasons in the Bahamas and in NL, it might be possible to cross promote recreational boating in the southern waters with boating in northern NL waters. • Although share-time and boating charters are not available in NL, market indications are that this may become a possibility. • Marine training and learning courses are offered in Holyrood, NL; the potential exists to examine this offering as a component of the education vacation market. • Marinas can be cross promoted with markets for cruise ships, scuba diving, tour boating, kayaking, flotillas and shore based special events and activities. <p><u>Market Readiness:</u></p> <p><i>Note: we define market readiness as the ability of ports to accommodate the defined needs of the recreational boaters.</i></p> <ul style="list-style-type: none"> • We found many marinas at varying level of market readiness. • None are fully market ready and in a position to compete with high-end international marinas visited by the national and international boating market. • To support the concept of market readiness, marina design needs to take a comprehensive approach to the development of services and amenities.
Quality	<ul style="list-style-type: none"> • The NL sailing experience is said to be among the best marine adventure found anywhere. • We have the product but need to provide supporting services and an overarching conceptual framework if the economic development opportunities of this market are to be realized. • The quality of marinas in this province varies greatly, but generally speaking, we need to enhance amenities and services, if we are to attract and maintain both the national and international markets to support economic diversification.
Tourist Amenity	<ul style="list-style-type: none"> • Very few marinas have integrated tourism amenities on-site. One of the best places where tourism amenity is well developed is Salton's Brook, Terra Nova National Park. • Generally speaking more effort is needed to develop design programs for marinas to provide the product and services recreational boaters are demanding.

6.0 MARINA STRATEGY CONCEPT DEVELOPMENT

The proposed development framework for the marina strategy has three principal components:

- a. Strategic locations;
- b. Level of development; and,
- c. Proposed touring routes and marine destination areas.

6.1 Strategic Marina Locations

Strategic marinas are marinas that intercept current national and international boating markets. The marinas are located at ports that visiting recreational boating tourists would visit on their navigation tour of NL. Two types of strategically located marinas exist, Gateways and Home Ports.

6.1.1 Gateways:

Several points of entry, or "Gateways", into NL were identified as being the first port of entry that the international / national recreational boating tourist would make on coming into our coastal waters. The market analysis indicates that these are geographically determined and are for the most part found on the outer headlands of the province. There are several ports or communities that fall into the Gateway category: Port aux Basques, Fortune, St. John's, and St. Anthony.

Port aux Basques, due to its location on the south west coast and as a major terminal for Marine Atlantic, would be expected to capture recreational boats transiting from the United States and from Nova Scotia. As well, Port aux Basques would capture recreational boating traffic that is moving down the St. Lawrence River from Upper Canada.

Fortune, on the south coast, is well placed to link with international recreational boats that transit east and west between the United States, the UK and Europe; these boaters also frequently stop at St. Pierre Miquelon.

St. John's, on the east coast can function as a Gateway for recreational boaters travelling to and from Europe.

St. Anthony, due to its location on the northern tip of the province, may be seen as a Gateway for recreational boats taking a more northern route via Greenland to Canada and along the coast.

6.1.2 Home Ports:

There is also a need to establish strategic locations where a recreational boat on an island circumnavigation can overwinter, with the intent of resuming the route the following summer. At its most basic the concept of a Home Port simply refers to a port where a boat can be overwintered out of the water conveniently and safely. In the context of a recreational boater intending to complete a circumnavigation of the island, over a multi-year period, Home Ports would have to be strategically located around the NL coastline. Given the nature of recreational cruising, the decision with regard to where the boat may overwinter lies ultimately with the specific requirements of the boat's captain or owner.

Being strategically located to support the circumnavigation of the province and a tour of the Labrador coastline, Home Ports have to meet certain marine service needs related to facilities and proximity:

- a. First and foremost is a means of lifting the boat out of the water, whether it is by heavy lift crane or a travel lift, and with available lay down area.
- b. Security during storage is also a key factor.
- c. Access to electrical power and potable water.
- d. Availability of mechanical services.
- e. Availability of land-based accommodations and amenities.
- f. Proximity to an airport.

Many ports in NL have travel lifts and adequate lay down areas operated by Harbour Authorities and meet many of the necessary criteria for a Home Port, but all are not strategically located. There are also ports that are strategically located but are deficient in one or more of the criteria for being a Home Port. Such ports would need to be upgraded to a level appropriate for a Home Port.

A second feature of Home Ports is their ability to function as a base of operations / visitation. That is, the recreational cruiser has the option to use the Home Port as a base of operation to explore other features of a given area, e.g., Notre Dame Bay. Based on a circumnavigation of the Island and cruising coastal Labrador, ports that can be identified as being strategically located and designated as Home Ports are:

- a. South Coast – Fortune
- b. Northeast / East Coast – Holyrood, Lewisporte
- c. Northern Peninsula - St. Anthony
- d. West Coast – Corner Brook

6.2 Proposed Touring Routes and Marine Destination Areas

Circumnavigation of Island Portion of Newfoundland and Coastal Labrador

It is quite conceivable that a recreational boater could complete a circumnavigation of the island in one summer and indeed it has been done. However, this falls more in the realm of racing and not recreational boating. The goal of the recreational boater is to explore harbours, isolated anchorages, and ports en route, to experience the scenery, the isolation and culture of local people.

This study proposes a multi-year cruise that would take a recreational boater around the Island of Newfoundland and includes a coastal route part way up the Labrador coast to Battle Harbour. This cruise would have four legs, corresponding to the south coast, the northeast coast, the west coast, and the Labrador coast. Each leg would include a Gateway, a Home Port and marinas that are at L1 to L3 levels of development and includes the option to overwinter at any of the designated Home Ports. Each leg could be seen not only as a section of the circumnavigation experience but an undertaking in and of itself.

This model has the extra advantage that it lends itself to a second option, which is a partial circumnavigation. Recreational boaters from the United States on entering Newfoundland coastal waters at Port aux Basques, may opt to spend the summer exploring the south coast and then return home. Ideally they will have been so captivated by their experiences on this cruise that they will return the following summer, perhaps to explore the west coast.

As the recreational cruising horizon of boaters expands with the development of more facilities on the Labrador coast, there is the potential to expand the route further north to Nain and Torngat for the adventurer recreational boating tourist.

The third level of the tour (Tertiary Marine Destination Tour Concept) supports tours from the homeports and within the Marine Destination Areas.

Please see following Matrix of Marinas (proposed level of development L1-L3) and maps of Leg 1, 2, 3, and 4.



**Leg 1-
WEST COAST
(& LABRADOR):
Port aux Basques
to St. Anthony**

	<p>Box 504 St. John's, NL Canada A1C 5K4 T 709.738.2500 F 709.738.2499</p>		<p>prepared for  Newfoundland Labrador</p>	<p>project NL Marina Strategy</p>	<p>component Leg 1 - West Coast</p>	<p>date 2007</p>
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 <p>Box 504 St. John's, NL Canada A1C 5K4 T 709.738.2500 F 709.738.2499</p>	 <p>PHB GROUP</p>	<p>prepared for</p>  <p>Canada Newfoundland Labrador</p>	<p>project</p> <p>NL Marina Strategy</p>	<p>component</p> <p>Leg 2 - Northeast/ East Coast</p>	<p>date</p> <p>2007</p>
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Leg 3-
SOUTH COAST:
Port aux Basques to Holyrood

 <p>Box 504 St. John's, NL Canada A1C 5K4 T 709.738.2500 F 709.738.2499</p>		<p>prepared for</p>  <p>Canada</p> <p>Newfoundland Labrador</p>	<p>project</p> <p>NL Marina Strategy</p>	<p>component</p> <p>Leg 3 - South Coast</p>	<p>date</p> <p>2007</p>
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Leg 4-
COASTAL LABRADOR:
St. Anthony to Happy Valley-Goose Bay



	prepared for	project	component	date
 <p>Box 504 St. John's, NL Canada A1C 5K4 T 709.738.2500 F 709.738.2499</p>	 <p>PHB GROUP</p>	 <p>Newfoundland Labrador</p>	<p>NL Marina Strategy</p>	<p>Leg 4 - Coastal Labrador 2007</p>

6.3 Marine Destination Areas

As with the study, *A Special Place, A Special People*, where land-based tourism markets in different areas were classed as 'tiers' based on their attractions and amenities for tourists, it was felt appropriate to use a similar model for marina-based tourism. This study proposes two tier levels, a Marine Tier 1 and a Marine Tier 2. When overlaid with the tiers identified in *A Special Place, A Special People*, there is, as can be expected, a high degree of congruency or fit with the Marine tiers. However, there are some notable differences: for example, the Notre Dame Bay area is identified as a Marine Tier 1, with Lewisporte as the Home Port for the area.

6.3.1 Marine Tiers as Tourist Destination Areas

The areas that fall under the two tiers for marine-based destinations touch on all coasts. Unfortunately, except for Fortune, the south coast is not well represented at the tier level, although there may be future opportunities.

- a. Marine Tier 1 - Notre Dame Bay
- b. Marine Tier 2 - Bay of Islands to Bonne Bay
 - St. Anthony to Battler Harbour
 - Fortune to St. Pierre
 - Conception Bay - Trinity Bay - Bonavista Bay

Priority/ Area	Description	Rationale/ Key Developments
Tier I – Notre Dame Bay ²	<p>Notre Dame Bay will be promoted as the premier recreational boating destination in the province.</p> <p>Notre Dame Bay offers some of the best sailing in NL: numerous islands to explore and anchor off; the islands provide protection from the open Atlantic, subsequently wave size is more moderate; and the winds are consistently from the southwest, and as they blow over the land they are quite warm.</p> <p>A full-service marina is proposed for Lewisporte and a Marina Service Centre with docking and marine repair services for > 55' vessels is proposed for Triton.</p> <p>Day-tours from Lewisporte will be formalized and the entire marina site should be enhanced and the number of berths expanded.</p> <p>The marina should become a focus for both land based and marine based tourism. The proposed downtown development strategy for Lewisporte provides the opportunity to link and integrate the marina into the downtown and enhance the marina as an</p>	<p>Lewisporte is, next to the Royal NL Yacht Club, the most well developed marina in the province.</p> <p>It is a designated home port for Notre Dame Bay and is an excellent marina with numerous marina-related amenities, travel lift and laydown for winter.</p> <p>It is a port of entry for the CANPASS system.</p> <p>The Gander airport is only a 40minute drive, allowing for easy access for commissioning the boat following the winter lay-up season.</p> <p>Several other ports in the area – Triton, LaScie, Twillingate and Durrell have the ability to offer lift-out and mechanical services for recreational boaters. These ports are designated L2 and L3</p> <p>The Gander – Lewisporte link is also convenient for crew changes during the summer.</p> <p>The marina has been developed and successfully managed since its inception and currently seeks funds to support expansion.</p> <p>The existing marina is at capacity and it is in proximity to a large resident market, thus ensuring the economic sustainability of the marina.</p>

² Of all the bays in NL, Notre Dame Bay is recognized by resident cruisers as the best bay to boat in. There are several features that make it a prime cruising ground that would be recognized by non-resident boaters as well:

- The prevailing wind blows from the southwest which has several implications:
 - The wind blows over the land and is generally warm.
 - Since the wind blows over the land, there is little fetch and waves are comparatively small, even on windy days.
 - The wind tends to be steady and not dusty as in Conception Bay.
- There are numerous small islands dotting the bay:
 - They offer shelter from offshore winds, moderating their affect as well as reducing the build up of larger waves. Consequently, when it could be quite uncomfortable sailing outside the islands, inside you can still have a pleasant sailing day.
 - The islands not only offer shelter and protection, but they offer safe places to anchor off.
 - One can go ashore and explore old grave yards, abandoned settlements, and pick berries.
 - They offer solitude, a feature much valued by many cruisers.
 - They offer splendid and unspoilt scenery.
- Much of the bay is only a day's sail from Lewisporte.
- Lewisporte probably has the best marina facilities in the province.
- Lewisporte has many town amenities, such as: accommodations, restaurants, grocery stores, etc.
- The Lewisporte Marina has an excellent proactive management team, and produced an excellent cruising guide for the Notre Dame Bay area.
- Lewisporte is 52km (a half hour) drive from Gander airport. St. John's, the capital city, is approximately 650 km (seven hours) drive away.
- In addition, there are other marinas available, such as: Triton, Botwood, Twillingate, and LaScie.

Priority/ Area	Description	Rationale/ Key Developments
	<p>anchor attraction of the community and the region.</p>	<p>As both infrastructure and marketing and promotion are developed, the number of non-resident boaters should increase.</p> <p>Triton is positioning itself to become a marine service centre with docking, maintenance, ship repair and winter storage facilities for larger boats.</p> <p>The development of the Triton facilities is supported by the Lewisporte Marina who is not equipped to handle larger vessels.</p>
<p>Tier II – Bay of Islands and Bonne Bay, Gros Morne National Park</p>	<p>The west coast of the Island has surprisingly few good sites for marina development.</p> <p>Much of the coast is a straight shore making developing larger marinas a challenge.</p> <p>The exception is the Bay of Islands and Bonne Bay. Both bays are quite beautiful and informal information from consultations tells us that the number of national and international boaters is steadily increasing.</p> <p>The Bay of Islands Yacht Club is adjacent to the City of Corner Brook and is a day's sail from a Tier 1 Tourism Development Area, Gros Morne National Park.</p> <p>As well, the Humber Valley Resort is seeking berths at Sunnyside/ Irishtown Marina. The planned housing developments in the area are European based.</p> <p>The Bay of Islands Marina is located adjacent to Bartlett's Point, a key open space in the Bay of Islands that the city of Corner Brook has prioritized for development. The program for this open space development could be integrated with the program for the Bay of Islands Marina.</p>	<p>The Bay of Islands Marina is currently at capacity and is seeking funding support to expand.</p> <p>The challenge with the site is the limited room available to support expansion. The water depth in the bay is such that an expansion to beyond 100 berths will be a challenge.</p> <p>Across the bay the Irishtown/Sunnyside Marina is also expanding. This marina is also limited in terms of expansion due to the depth of water in the Bay.</p> <p>Due to challenges with marina expansion in the Bay of Islands, we are proposing that both marinas be developed. The Bay of Islands should have homeport designation given the number of berths, the management organization in place and on-site amenities.</p> <p>The marina for Norris Point is newly developed at Neddie's Hr. A tourism development plan prepared for the Town includes a new full service marina.</p> <p>To support the concept a new full service marina should be developed in Norris Point.</p> <p>We propose that associated marine services and winter storage take place in neighbouring Glenburnie.</p>
<p>Tier II St. Anthony to Battle Harbour</p>	<p>St. Anthony is strategically located and is identified as an international gateway port for the Province.</p>	<p>St. Anthony Harbour accommodates cruise ships and a number of recreational boaters use the harbour.</p>

Priority/ Area	Description	Rationale/ Key Developments
	<p>It is located within a Tier I tourism development area being located adjacent to L'Anse aux Meadows National Historic Site.</p> <p>The harbour in St. Anthony has lots of room for expansion and marine services are available.</p> <p>Battle Harbour is already on the sailing itinerary of the Cruising Club of America. The Historic properties at the site have been recognized internationally.</p> <p>Also included in this Tier II Marine Tourism Destination area is Red Bay National Historic Site. This site has been nominated for UNESCO status and is well known globally.</p>	<p>A challenge expressed by the local Authority is their limited ability to accommodate recreational boaters.</p> <p>St. Anthony is strategically located to accommodate international boaters from Europe or Greenland and Iceland.</p> <p>From St. Anthony boats have a choice of either sailing west through the Gulf or south along the northeast coast of NL.</p> <p>St. Anthony is a port of entry for the CANPASS system.</p> <p>The site is within sailing distance of three internationally recognized attractions.</p> <p>The airport is less than one hour away.</p> <p>The town has a variety of land based services and attractions to support the mariners needs.</p>
<p>Tier II Fortune to St. Pierre</p>	<p>Fortune is proposed as the home port for the South coast of the Island.</p> <p>It is close to the French island of St. Pierre that is recognized as one of the key tourism attractions along the Burin Peninsula.</p> <p>It gives visitors to Grand Bank and Fortune access to an international country with a distinct European flavour. This is unique to North America.</p> <p>Fortune has a well developed marina and a scheduled ferry linking Fortune to St. Pierre year long.</p> <p>St. Pierre is also the contact point for a number of annual flotillas out of Nova Scotia; the intention should be to have Fortune included in the itinerary for these special events.</p> <p>Fortune could be promoted as the gateway to St. Pierre and the south coast of the Island.</p>	<p>Fortune has a well developed marina with laydown areas and marine services available.</p> <p>A customs office is located in the community.</p> <p>The Town has a number of amenities to support marina visitors.</p> <p>The marina is conveniently located adjacent to the downtown, the St. Pierre Ferry and local tourism information and interpretation centre about the Fortune Head Ecological reserve is located on site.</p> <p>The key drawback to the area is that the closest Canadian airport is in St. John's, over a three hour drive away.</p> <p>A small airport does exist in St. Pierre.</p> <p>Day tours to Harbour Breton, St. Pierre and Burin can easily be developed. Each of these communities will have special appeal for the mariner.</p> <p>The south coast is recognized as the "undiscovered shore" as it relates to tourism development.</p> <p>The coastline is spectacular and it is along this coast that the mariner gets</p>

Priority/ Area	Description	Rationale/ Key Developments
		<p>access to some of most remote and picturesque ports and harbours in the Province.</p>
<p>Tier II Conception Bay – Trinity Bay – Bonavista Bay</p>	<p>Conception Bay is home to a number of marinas that generally support the resident market, although some mariners from international and national waters do use the marina facilities in the area.</p> <p>Boaters from Conception Bay regularly sail along the north east coast between these three bays.</p> <p>The touring often extends to include Notre Dame Bay.</p> <p>The clustering of amenities and attractions, along this part of the NL coast, represents the biggest concentration on the island.</p> <p>The Holyrood Marina is located in a Tier I land-based tourism destination area that includes St. John's.</p> <p>Mariners can also connect to another Tier I land-based tourism destination area at Trinity.</p> <p>From Trinity a boater can visit Bonavista a Tier II land based tourism destination area with numerous amenities for boaters.</p>	<p>Holyrood is designated as the homeport for this Tier II Marine Tourism Destination Area.</p> <p>The marina is currently at capacity but has plans for expansion.</p> <p>Two other marinas are in close proximity to Holyrood, one in Foxtrap and the other, the RNYC in Long Pond. Both of these facilities are at capacity and have limited opportunity for expansion.</p> <p>Holyrood is close to the TCH and is a 40 minute drive from St. John's International Airport.</p> <p>The Town has a golf course close by, a restaurant, retail services, and some accommodation.</p> <p>Marine services are available in Conception Bay and Harbour Grace.</p> <p>Holyrood marina can readily be expanded to include more berths and an expanded laydown area.</p>

(See Figure 11 – Tier 1 and 2 Product Development Areas and Marinas)

Figure 11



6.4 Level of Development

Between the Gateway and Home Port categories are numerous other ports and secluded harbours that may have appeal to the visiting recreational boater. These are the places that the recreational boater may choose to visit. Most of these ports are managed by Harbour Authorities, some are managed by their communities or boating clubs in their communities, others are secluded anchorages. The extent to which these ports / communities can meet the needs of the recreational boater varies considerably, but it is critical that ports that fall within a day's sail as established by the cruise / time assessment should meet a certain level of development. For example, the marinas in Bay of Islands, Lewisporte, Holyrood, Foxtrap, and RNYC, all have waiting lists for berths.

Although the thrust of this study is on the potential market for the international and national recreational boater, the growing of a local market is significant as well. Currently, the demand for recreational berth space in marinas and in ports under Harbour Authorities far outstrips the supply, especially in the more heavily populated areas.

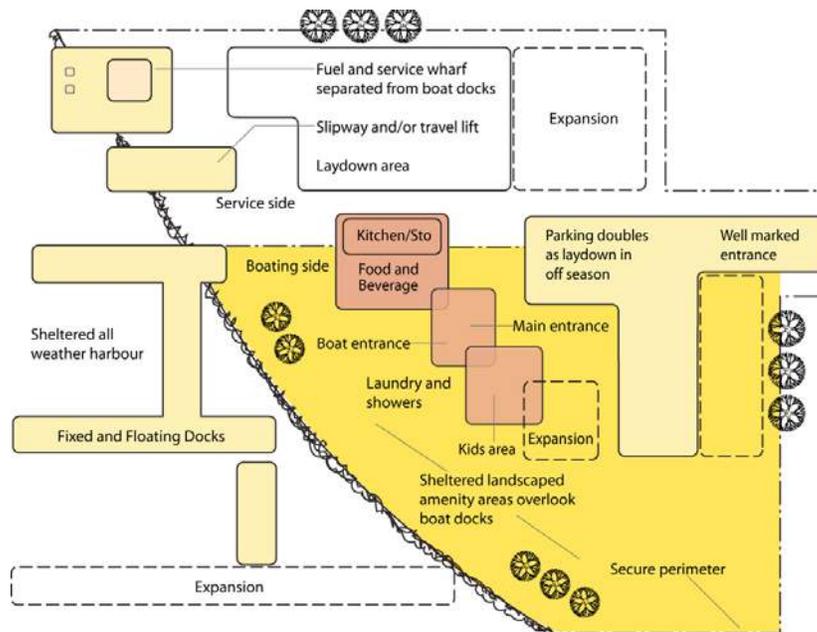
6.4.1 Level 1 - Full Service Marina

The full service marina would be expected to have the highest standard of development and amenities relative to the other marinas. The criteria for a full service marina would include, among other things:

- a. Secure and well-serviced docks, with floating docks for boats under 40 feet, and fixed docks for boats in excess of 40 feet.
- b. Potable water and electrical power brought directly to the boat berth; local area internet network.
- c. An on-site building with washrooms, showers, laundry facilities, food and beverage service, and multi-purpose room.
- d. Landscaped site with outdoor sitting, recreational, and children's area.
- e. High level of on-site or nearby amenity including restaurant, pub, shopping, accommodations, and recreational facilities.
- f. A travel lift or some other means of lifting a boat out of the water on-site or close by, and with a lay down area.
- g. Fuel availability – either on-site or readily trucked to the marina.

- h. Access to mechanical and boat repair services in the community.
- i. Reasonable proximity to an airport.

It should be noted that the level of development for Gateway Ports or Home Ports may not need to meet all criteria for a L1 port. Gateways and Home Ports are designated due to their geographical location. Port aux Basques which is designated as a Gateway Port is an established harbour and the destination point for the Marine Atlantic ferry from Nova Scotia. A recreational boat arriving in Port aux Basques with the intention of sailing along the south coast will most likely only stay a few days. Given the strategic location of gateway ports, boaters may look to these areas for overwintering or lay-down and storage facilities (Appendix G – Schematic Layout of Full Service Marina).



Schematic Layout of Full Service Marina

6.4.2 Level 2 - Partial Service Marina

The degree of development for a Level 2 marina would not be as extensive as for L1, but still provide a reasonable level of service for its users:

- a. Secure and well-serviced docks, with floating docks for boats under 40 feet, and fixed docks for boats in excess of 40 feet.
- b. Potable water and electrical power brought to the head of the dock.
- c. An on-site building with washrooms, shower and laundry facilities.

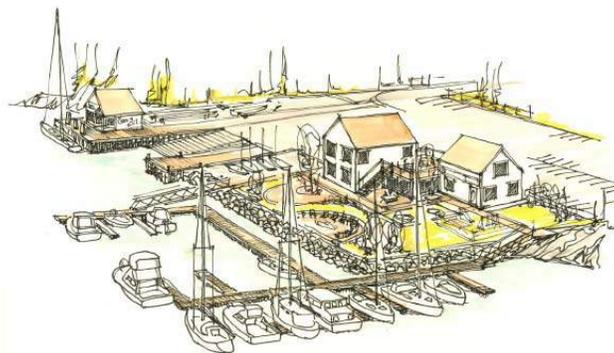
- d. Landscaped site.
- e. Some nearby amenities.
- f. A lift-out service may not be on site but within a day's sail.
- g. Fuel availability trucked to the marina
- h. Access to mechanical and boat repair services in the area

6.4.3 Level 3 - Basic Services

Level 3 would have the greatest number of ports but have the lowest level of development. For the most part these would be located in smaller communities, with a small population base, that would find it difficult to provide more services in a self-sustainable manner.

However, having a lower level of service does not suggest that these ports / marinas are of less importance from a recreational boating tourist or strategic point of view. Indeed, along the south coast and to a lesser extent on the west coast, these smaller ports are critical and have a strategic importance as shown by the findings of the cruise time / distance assessment model; they are designated stops along the circumnavigation route of the province. The development requirements for Level 3 ports / marinas are not very onerous: (See Figure 12 – Circumnavigation of NL)

- a. Provision of a safe docks and/or moorings with a reserved berth or space for visiting recreational boats.
- b. Availability of potable water.
- c. Attractive, organized site with some level of service and authority.



Marina Concept Sketch

6.5 Marketing Framework

The marketing framework is developed around 5 topics:

- A. Markets
- B. Competition
- C. Positioning
- D. Marketing Tactics
- E. Product / Market Match

A. Markets

It is difficult to quantify markets in absolute terms for NL as a sailing/power-boating destination. In general terms, we have learned both anecdotally and from some studies (including the South Coast yachting and Cruise Ship Study) that there are five loosely defined markets:

- Local yachts and cruisers, Newfoundlanders and Labradoreans;
- Non-resident national cruisers;
- Flotillas; and,
- Transient Cruisers crossing the North Atlantic, and from the northeast United States.

In the near term, the primary market that we see for NL is the resident market: local yachts and cruisers. For the purposes of this project, and to identify long term opportunities, the focus is primarily on new markets, specifically those not originating in the province. Through many discussions with operators around the province, we have subdivided potential boaters into the following categories:

Boat Type	Boat Size		
	Small	Medium	Large
Sailboats	Under 20 feet Market Size: Large Opportunity: None	20 feet – 30 feet Market size: Medium Opportunity: Small	30 feet plus Market Size: Medium Opportunity: Large
Power Boats	Under 30 feet Market size: Medium Opportunity: None	30 feet – 50 feet Market Size: Large Opportunity: Small	50 feet plus Market Size: Small Opportunity: Very Large

In assessing market potential, two factors have to be considered: the size of the group, and the ease of persuasion of that group. Large-sized markets that have prohibitive obstacles preventing them from coming to the province do not represent significant opportunities. Thus, small powerboats and sailboats represent little or no opportunity for the marina strategy, as the distance to travel to get to the province is beyond the capability of these boats. Based on a 1994 Michigan State University study, there were over 6 million boats in the Great Lake states, plus Ontario and Quebec. It was estimated that 80% were less than 20 feet, and the number of 20+ foot boats that would have the potential to travel to Newfoundland (based on boats in the Great lakes and St. Lawrence area) is 360,000. It is estimated that half this number again (180,000) would be a more practical and conservative figure to use as a market potential baseline.

B. Competition

All along the US eastern seaboard, there are regions that are competition for the province. Given the province's remoteness, any marine region between the Caribbean and Nova Scotia represents significant competition.

Market potential analysis requires understanding the basic number of users in a market that would be capable of buying a product or using a service. Other factors then begin to affect the analysis of the true market potential; particularly, in this case the significant competition that exists in other markets and geographies for these 180,000 potential boaters. If we use simple tourism travel statistics to compare the number of travelers to NL to the number of tourists in other markets, we'll see that the remoteness and lack of awareness about the province is a natural filter. Given that the United States has over 50 million international tourists every year, but Newfoundland has only 500,000 TOTAL tourists every year, we can see that the market potential shrinks rapidly, as boaters (a) have so many options, (b) may be unaware of the province, (c) may see Newfoundland as being too far away/too remote, (d) may be intimidated by the perception of being a rugged and harsh sea/environment, (e) may be aware that the amenities are sub-par compared with other locations.

It is estimated (conservatively) that each of these five distinct factors could cut the market potential in half, meaning that the true market potential (of boaters who are looking for a new single option, are aware of the province, do not see the distance as an obstacle, are interested in the environment of the province, and are not looking for five-star amenities) is 5,625 boats annually.

Given that, anecdotally, the number of international boats that visit the province annually probably numbers between 100 and 200, this represents a significant opportunity.

C. Positioning

Three market areas were identified as having potential with respect to developing a tourist recreational boating industry in the province:

- a. **A local provincial market**, involving recreational boats from NL moving between ports in the various bays and coastlines of the province;
- b. **A national market**, consisting of recreational boats coming from the Maritime Provinces, as well as Upper Canada via the St. Lawrence River; and,
- c. **An international market**, consisting of recreational boats coming from the United States, either directly or via Nova Scotia, and boats from the United Kingdom and Europe, either directly or via St. Pierre.

D. Marketing Tactics

Recommendations:

- Strong coordination between groups responsible for selling the provincial marina product.
- Partnerships between the tourism agencies and the private sector in promoting the marina/cruising product.
- Close involvement of tourism industry associations in the development and implementation of marketing programs.
- Emphasis on tactical advertising (i.e. geared toward particular segments as discussed above).
- Cooperative advertising with travel partners, as they become involved.
- Marketing support for small hotels, B & Bs, and other amenities to improve their ability to sell their products.

Best practices learning from other markets (British Columbia, Alaska and Cape Breton) have suggested that the two best and most effective means of marketing are through the

internet and word of mouth. Word-of-mouth marketing efforts are difficult to control but can be accelerated through strong brochures and promotional (image building) advertising.

Research has shown that many yachting and power-boating enthusiasts tend to return to the same fishing lodge, yacht tour or marina year after year.

A two tier approach to marketing and promotion is generally the most effective way of establishing a relatively new product in a market – those two are being brand positioning (image) and retail promotion (call to action).

Brand Strategy: Rugged and Remote

Brand building advertising and promotional efforts that clearly define NL in that context:

- Magazine advertising among leading yachting and power-boating publications.
- World class website and strong promotion of the website in advertising.

Retain Promotion: Packaging and Tours

- Brochures outlining length of tours, and additional things to see and do on these tours. Brochures need to strongly feature the exotic or unexpected things to see and do at various stops.
- There is an industry trend towards packaging marine wildlife viewing and sightseeing with yacht tours, flotillas and marina marketing. This would require strong partnerships with local businesses for the marinas featured prominently for further development.

E. Product / Market Match

Product: Large yacht homeport and marine services (such as Triton)

This product matches the non-resident market with owners of large cruisers and yachts 55 feet and over. There is potential for the long term development market with this group, as the distance for these larger boats to travel in open water to get to NL is manageable. This is a high return on investment market given the high disposable income of owners. Market development should focus first on marine services and storage, followed by the development of supporting marina infrastructure.

Development of this market will require a detailed and thorough market analysis, including a potential return on investment scenarios. A number of the ports in Nova Scotia, such as Lunenburg, and along the eastern seaboard of the United States (Gloucester & New Bedford) are attempting to attract the same market.

Product: Smaller homeports such as Bay of Islands, Holyrood and Fortune.

The product matches both the resident and non-resident market who own sailboats and power boats. This has a large market potential, as the existing resident market is of a significant size. The non-resident market is huge in size, but the smaller the boat is, the less likely it will come to the province for touring, due to the open seas sailing requirement to get here. These markets are looking for some basic marina services and amenities, and hassle-free docking.

Product: Gateway ports, such as Port aux Basques, St. Anthony and St. John's.

This product is a match to most markets, given that the gateways are the draws to connect people to the province, and would generally have/require the required marina services and amenities nearby. All travelers to the province, and resident boaters, would, depending on their travels and nature of their trip, be drawn to a gateway in their proximity.

Product: Recommended L1, L2, and L3 marinas.

This product matches to both resident and non-resident markets. Based on the approach of understanding boaters' usage patterns in terms of distance traveled per day and expected usage of marinas, the L1, L2 and L3 strategy was developed. Using the sail-time analysis, the expectation is that all sail and power boats following one of four tours of the province will need to have basic amenities and space availability in the ports/marinas identified. As such, from a product/market match perspective, as this market gets further developed, it is critical that these products incur the necessary improvements and growth to be able to deliver the provincial marina product.

7.0 PRIORITIES FOR DEVELOPMENT

To develop and implement the Marina Strategy successfully is a long-term proposition. Indeed, in the short term the only immediate opportunity is with the resident market. It is by providing the infrastructure and level of service to the resident market that NL is positioned to take advantage of opportunities related to national and international recreational boaters.

While the province is not well known in national and international boating circles, it is slowly developing a reputation for its pristine waters, friendly ports of call, brilliant coastal landscape and sailing solitude. To attract an out-of-province market we need more and better full-service marinas, programmed to support the local tourism product, and marine services and winter storage facilities developed by utilizing existing fisheries infrastructure.

As marinas along the Gulf of St. Lawrence and along the Eastern Seaboard of the US become even more congested, the opportunities to develop NL as a destination with home port opportunities for boaters will only increase. We are proposing a rational approach to marina development that takes into account the needs of the target market and current capacity, and focuses on reorienting fisheries-based infrastructure to support the recreational boating markets.

We believe, and have stated throughout this document, that the marina strategy should focus on home porting because that is where the greatest opportunity for benefit lies. This means developing several full-service marinas and associated marine service centres, strategically located around the Island.

In many instances, marinas and marine services areas are in the same bay but are located in different communities. For example, in Notre Dame Bay, Lewisporte is identified as the home port while Triton will be the marine service centre. Triton and a number of other ports in the province have the marine services infrastructure facilities built around the fishing industry, to support marine services and repair, with winter storage space available for recreational boats. Fisheries infrastructure can be modified to support the system of marinas island-wide.

The proposed recreation boat touring routes for the province include four (4) distinct legs. Three of them together comprise the circumnavigation of the island and the fourth a coastal tour of Labrador. This touring model is based on a similar round-island route that has been successfully developed in Ireland. Within each touring leg are proposed Marine-based Tier I and Tier II Tourism Destination Areas. These destination areas roughly parallel the Land-based Tourism Development areas for the

province. The one exception proposes a Tier I Marine Destination Area for Notre Dame Bay, where there is no associated land-based tourism destination.

Our findings indicate that our priorities for development should be influenced by the following:

1. Much of the needed marina infrastructure exists and was developed to support the fishery. This infrastructure needs to be enhanced to support the specific needs of the recreation boating market, particularly marine servicing, home porting and L1 and L2 marinas.
2. Much of the infrastructure for a number of L2 and L3 marinas is in place. In many instances, L3 marinas can be accommodated by giving shore-based facilities a “face-lift” and by adding installation of floating docks or moorings.
3. Linking the land-based tourism development areas with the marina-based areas enhances the opportunities for economic viability and reduces infrastructure development costs.
4. The marketing framework identifies an opportunity to develop ports and marina services to support initially the resident market, and over the larger term the non-resident market.

We are suggesting the following development priorities for the province:

Development Priorities	Approach / Rationale
PRIORITY 1	
³ Home ports / Marine services Lewisporte Holyrood Bay of Islands Fortune	A combination of homeports with marine services located on site or in an adjacent facility should be pursued. A study funded by ACOA and completed in 2004 focused on the potential for the province to support the recreational boating marine services industry.

³ Although not listed as a Homeport we are proposing the opportunities to develop Triton as a Marine Service Centre and Marina for large yachts and cruisers over 55' be thoroughly investigated. This initiative we see as a private investment and being promoted by local entrepreneurs who have already been able to, in a small way, access this lucrative market.

As the current operator is heavily involved in providing marine services to the fisheries sector and involved in small scale manufacturing the chances for success in providing marine service to recreational boaters are increased as the profitability of the operator is not solely based on the recreational boating market.

The local entrepreneurs, who are spearheading this initiative, also see opportunities related to boat charters and shore based high end residential development to complement the marina.

The potential success of the Triton proposal could lay the ground for growth in this market in the province, and the ability to combine the marina and marine service sectors to encourage homeporting.

Critical to the success of the Triton development will be a comprehensive plan that combines functional business planning with physical planning, to confirm the feasibility of the proposed developments.

Development Priorities	Approach / Rationale
	<p>The concept we have presented builds from the opportunities identified in this study.</p> <p>As the concept of home porting represents the greatest potential return on investment, then the development of these ports in combination with all the amenities the recreation boater is looking for should be the priority.</p> <p>We suggest that these ports either have new master plans or updated plans developed that focus on a program of development that includes the study components and process suggested in Section 8: Implementation / Evaluation.</p> <p>For each site transient berths must be allocated to support the national and international recreational boater.</p> <p>In the interim, as this market is developed, the local resident boating market in each of the home ports should ensure the economic sustainability of each port.</p>
<p>National and International Gateways St. Anthony St. John's Port aux Basques Fortune Marina Destination Areas L1 & L2 Marinas</p>	<p>The national and international gateways are strategically located to intercept the key out-of-province markets, so the upgrading of facilities in these ports should be given a priority.</p> <p>Fortunately, each of the four ports identified already has some level of amenity in place.</p> <p>In each of these ports, part of the focus must be on orienting boaters to NL and the array of services and amenities we have to offer as a province.</p> <p>These sites will be critical for gathering information on boaters: destination, port of origin, services required, etc.</p> <p>Marina Destination Areas L1 and L2 marinas.</p> <p>Develop L1 and L2 marinas associated with the marina destination areas identified.</p>
<p>Promotion in Cruising Guide / Magazines/ Website</p>	<p>Two separate cruising guides for Labrador and Newfoundland were developed in the 1950's. A guide to the province was updated and published in the 1990's.</p> <p>The Lewisporte Marina recently completed a guide to Notre Dame Bay that has been very well received.</p> <p>A new and consistently updated cruising guide for the province is needed. Cruising guides become obsolete within three to five years and should be updated in that time period.</p>

Development Priorities	Approach / Rationale
	<p>We suggest that the development of the guide be the responsibility of the Department of Tourism Culture and Recreation.</p> <p>The guide should be developed with industry support.</p> <p>For recreational boaters the cruising guide is the equivalent of the NL Tourism Visitor Guide put out by the Province each year.</p> <p>Advertising in top-end cruising magazines and the development of a high-end website should be pursued to promote NL as a marine destination. This is critical to a successful recreational boating industry.</p>
<p>Circumnavigation / Home Porting</p>	<p>Building from the Ireland experience, begin the development of a circumnavigation tour of the island and coastal Labrador.</p> <p>Divide the tour into the four distinct legs suggested. Integrate land-based amenities into the tour. Over time, as the ports of call are developed, integrate land-based activities and begin to develop special events around the tour.</p> <p>Attempt to develop each leg to ensure it takes a summer to complete to support the homeporting and marine services concept.</p>
<p>Hospitality NL umbrella organization for Cruise Organization</p>	<p>An organization that supports the recreational boating industry in the province is needed.</p> <p>As Hospitality NL is the voice of the tourism industry, we propose that an industry group under the HNL umbrella should be created to support the marina industry.</p> <p>Separate organizations could be put in place to support each of the Marine-Based Tourism Destination Areas.</p> <p>These areas could expand to include the ports included in the proposed touring legs of the Province.</p>
PRIORITY 2	
<p>Develop Level 1, 2, and 3 to support the Marinas.</p>	<p>Following the completion of Priority 1 components, and those ports associated with marina destination areas, the focus should turn to the development of the remaining ports.</p> <p>The priority for development would be those ports that are strategically located in the round-island and coastal Labrador tour.</p> <p>Marinas should have a management framework in place and have a confirmed means to support</p>

Development Priorities	Approach / Rationale
	development.
PRIORITY 3	
<p>Develop Tour NL Boating Brand</p>	<p>Once the desired infrastructure and an overarching management organization are in place, a vigorous marketing campaign to support recreational boating and the concept of home porting in NL should be put in place.</p> <p>The focus should be on pristine coastal landscape, solitude, friendly and helpful people, all supported by quality full-service marinas and marine services.</p>

8.0 IMPLEMENTATION AND EVALUATION TOOL

This marina strategy outlines a logical sequence of events that should take place if a successful recreational boating industry that attracts national and international boaters is to be established in the province of NL.

Part of the challenge that exists in the industry is the approach that is generally taken to marina development. Marinas should be developed from a business perspective and programmed to maximize economic return. To do this we must ensure that consistency is applied in the amenities and the level of service offered, particularly at the Level 1 and 2 marinas, homeports and gateway ports proposed for development in the strategy. As part of this study, we recommend the level of development and supporting amenities that should be in place for each classification of marina.

Applications submitted to ACOA and INTRD should be evaluated based on the services and amenities required at each port as described in Figure 13 - ACOA Port Application Assessment Tool.

The onus is on the applicant to submit information in an application for funding, and that application is evaluated against the criteria identified in the evaluation tool. Should information on suggested amenities not be provided in the application, then the proponent would be asked to re-submit and provide the needed information.

A critical component of the application is that a business case for each proposed development must be made and that the future management and maintenance needs of the facility are addressed.

Marina Design

The design for a marina must be comprehensive and based on the stated needs of the market. Our site visits and evaluations of existing marinas and services indicated a general lack of good integrated design that is supported by a program for the facility. Many marinas, for example, need to expand but are limited in that expansion by the initial placement of the breakwater.

Figure 13 - ACOA Port Application Assessment Tool

Port:

Criteria List	Existing	ACOA Office Use Only				
		L1	L2	L3	Gateway	Home port
Marina elements						
Marina Support Infrastructure						
1. Boats under 12 m (40 feet) - Floating docks						
2. Boats in excess of 12 m (40 feet) - Fixed docks						
3. Berths reserved on a safe dock / mooring						
4. Boat security						
5. Potable water brought to berths						
6. Potable water brought to dock						
7. Potable water available						
8. Electrical power - brought to berths						
9. Electrical power - brought to dock						
10. On site washrooms, showers, laundry facilities, and multi-purpose room						
11. On site washrooms, showers						
Marina Support Infrastructure						
12. Haul out facilities on site						
13. Haul out facilities – relatively short sail away						
14. On land storage or lay down area						
15. Mechanical & boat repair services – on site / community						
16. – in the area						
17. Fuel services – on site or trucked to dock -- trucked to dock						
-- Local gas (diesel) station near by						
18. Internet access						
19. Landscaped site - sitting, recreational, and children's area						
20. Landscaped site						
Community amenities (Applicant to list others as appropriate)						
21. Location – proximity to airport						
22. Location – proximity to highway						
23. Shopping – groceries, chandlery						
24. Restaurants,						
25. Accommodations						
26. Medical facilities or proximity to -- Hospital & drugstores						
-- Medical clinic						
27. Access to banking / Interac facilities						
Tourism attractions (Applicant to provide a list of attractions)						
28. High level						
29. Medium level						
30. Low level						
Operation & Management						
31. Strong Private Sector and/or Not-for-profit						
32. Dedicated Partnership Management Structure						

From a planning and design perspective the following should be a matter of course for all marinas that are classified as L1, L2, home ports or gateway port. There are five components to the Marina Master Planning process as described in the following table:

Marina Master Plan Components	
1. Design Program Development	<p>The program describes the activities that will take place, land-based and shore based, at the marina. The program is based on the requirements for L1-L2, Home ports and Gateway ports.</p> <p>While some components are set, others may vary depending on the context of the site and the site specific conditions that may impact the design program.</p> <p>The completed and agreed-to program is then analyzed and the spatial requirements for each program element identified.</p> <p>This allows the proponent to apply each program element and get an initial understanding of the capital cost for the facility that can be used to support a business case for the marina.</p>
2. Functional Planning	<p>We have found many marinas where facilities are simply put in the wrong place. Functional planning involved developing a relationship diagram to ensure a logic to the allocation of space and resources, and the circulation of people, vessels and vehicles.</p>
3. Design Plan	<p>The design plan involves locating all marina elements on the ground in a local grouping with the design, spatial requirements and functional relationships in place.</p> <p>The design plan would also include schematic 3D drawings and a dimensioned/rendered site plan to suggest the aesthetic quality of the marina – something that is generally lacking in marina development in the province – and allows for a refinement of the initial capital development cost, and begins to suggest the operational requirements for the facility.</p>
4. Business Case	<p>A business case should be made for each facility. This involves looking at the market, estimating number of visitors and comparing this against the costs.</p> <p>The goal is to determine whether the program developed will support the economic sustainability of the marina.</p>
5. Governance / Partnership Model	<p>To be successful, marinas should be either: (a) operated as for-profit business, or; (b) managed by a professional manager and administered by an elected or nominated board. The organizations should be incorporated and might include representation from the local council.</p>

(See Figure 14 – Levels of Development by Category)

Figure 14 - Levels of Development by Category

Port:

Criteria List	Existing	L1	L2	L3	Gateway	Home port
Marina elements						
Marina Support Infrastructure						
1. Boats under 12 m (40 feet) - Floating docks		✓	✓			✓
2. Boats in excess of 12 m (40 feet) – Fixed docks		✓				✓
3. Berths reserved on a safe dock or mooring				✓		
4. Boat security		✓				✓
5. Potable water brought to berths		✓				
6. Potable water brought to dock			✓			
7. Potable water available					✓	✓
8. Electrical power - brought to berths		✓				
9. Electrical power - brought to dock			✓			✓
10. On site washrooms, showers, laundry facilities, and multi-purpose room		✓				
11. On site washrooms, showers			✓			✓
Marina Support Infrastructure						
12. Haul out facilities on site		✓				✓
13. Haul out facilities – relatively short sail away			✓		✓	
14. On land storage or lay down area		✓				✓
15. Mechanical & boat repair services – on site / community		✓				✓
16. Mechanical & boat repair services – in the area			✓			
17. Fuel services – on site or trucked to dock		✓				
- trucked to dock			✓		✓	✓
- Local gas (diesel) station near by				✓		
18. Internet access		✓	✓		✓	✓
19. Landscaped site - sitting, recreational, and children's area		✓				
20. Landscaped site			✓		✓	
Community amenities (Applicant to list others as appropriate)						
21. Location – proximity to airport		✓				✓
22. Location – proximity to highway		✓	✓			✓
23. Shopping – groceries, chandlery		✓	✓			✓
24. Restaurants,		✓				
25. Accommodations		✓				✓
26. Medical facilities or proximity to						
- Hospital & drugstores		✓				
- Medical clinic			✓			✓
27. Access to banking / Interac facilities		✓				✓
Tourism attractions (Applicant to provide a list of attractions)						
28. High level		✓				✓
29. Medium level			✓			
30. Low level				✓		
Operation & Management						
31. Strong Private Sector and/or Not-for-profit		✓	✓	✓		✓
32. Dedicated Partnership Management Structure		✓	✓	✓		✓

9.0 RECOMMENDATIONS

1. Province-wide Concept:

- a. Adopt the concept of home porting: make it attractive and expedient for recreational boaters who have their vessels overwinter in NL. This concept supports the viability of the marina industry in the province.
- b. Promote the development of a multi-year cruising tour of the province. The tour focuses on the four distinct legs and involves the circumnavigation of the island and touring coastal Labrador.
- c. Develop a sequence of marinas to different levels, L1, L2, L3 to support the tour and the legs within the tour.
- d. Recognize the designations of Marine-based Tier 1 and Tier 2 Destinations, as distinct but parallel to the land-based tier destinations.

2. Markets:

- a. As supported by the Marketing Framework and resulting product market match proposed, focus mainly on large yachts and power boats over 55ft, and on sailboats and power boats from 20ft to 55ft.
- b. Develop a Cruising Guide for the province to support visitation to the province and promote the existing marina products. This would be the responsibility of the Department of Tourism, Culture and Recreation, who produce the annual Visitor Guide for the province. The frequency of the Cruising Guide need be no more than every 3 to 4 years.
- c. Augment the province's website to include information on marinas and recreational boating opportunities in the province.

3. Development Priorities:

- a. Proposed home ports and related marine services should be the first priority for development.
- b. The marine services component should focus on ensuring that existing fisheries infrastructure will support recreational boat marine services, repairs, maintenance, and storage.

4. Marina Design:

- a. Marina design should incorporate the criteria of the Evaluation Tool found in this document, addressing the services and amenities that must be found in Levels 1 to 3 marinas, home ports, and gateway ports. Preparatory work should identify a harbour's existing conditions, deficiencies, and proposed developments.
- b. Marina design must be program-based and relate to the functional planning and design development, and must be consistent province-wide in terms of presentation and quality of facilities offered.
- c. Master planning for marinas must be based on a business case scenario that identifies the return on investment and future management structure, and clearly identifies and qualifies maintenance needs. Consideration should be given to Levels 1 to 3 degree of development.

5. Fees, Management, and Monitoring:

- a. Marinas should maintain a visitor log, detailing information about the visiting boat (e.g., name, port registration, size, number of crew, etc.).
- b. Given that many harbours fall under the jurisdiction of Small Craft Harbours and management by their Harbour Authorities, Small Craft Harbours should be requested to include recreation boating needs in their funding programs for designated ports in the Marina Study Strategy. This is critical in smaller

communities where the population-base is insufficient to sustain a marina for recreational boaters.

- c. Where Harbour Authorities and community groups / boat committees share the same harbour, there should be emphasis placed on developing a co-operative approach to recreational boating requirements and operations (e.g., the Harbour Authority Officer collects fees on behalf of the boating committee). Boating committees invariably consist of volunteers who are not always available when recreational boats visit their area.

- d. Marina fee schedule should be consistent province-wide and need to reflect the cost of operations. Existing fee structures for boating are probably close to market; however, long-term fees for both recreational (especially commercial boats) are currently very low.

10.0 BIBLIOGRAPHY:

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- *PEI Marine Tourism Development Study: Market Demand Assessment and Product/Market Match*, 1998. Prepared for PEI Sailing Association, by Baker Consulting.

- *An Assessment of the Market Potential of the Northumberland Strait Area as a Sailing / Yachting Destination*, 2001. Prepared by The Economic Planning Group of Canada.
- *Nova Scotia Marine Tourism Study Final Report*, 1997. Prepared by The Economic Planning Group of Canada with McQuinn & Company Marketing and Corporate Research Associates Inc.
- *Recreational Marine Activities and Marine Development Study*, 1992. Prepared by Insight Incorporated for Marine Adventures Association of Newfoundland and Labrador.
- *Strategic Development Plan*, 2003. Prepared for the Port aux Basques Port Authority. Final (Technical) Report, Volume 1.
- *Port of Lewisporte Strategic Action Plan Report*, 2007. Prepared by Young Consulting Inc.

APPENDICES

APPENDIX A

Study Terms of Reference

RETURN BIDS TO:
RETOURNER LES SOUMISSIONS À:
Bid Receiving Public Works and Government
Services Canada/Réception des soumissions Travaux
publics et Services gouvernementaux Canada
Cabot Place, Phase II
Box 4600
St. John's, NL
A1C 5T2
Bid Fax: (709) 772-4603

SOLICITATION AMENDMENT
MODIFICATION DE L'INVITATION

The referenced document is hereby revised; unless otherwise
indicated, all other terms and conditions of the Solicitation
remain the same.

Ce document est par la présente révisé; sauf indication contraire,
les modalités de l'invitation demeurent les mêmes.

Comments - Commentaires

Vendor/Firm Name and Address
Raison sociale et adresse du
fournisseur/de l'entrepreneur

Issuing Office - Bureau de distribution
PWGSC / TPGSC - Nfld. Region
Cabot Place, Phase II, 6th Floor
Box 4600
St. John's, NL
A1C 5T2

Title - Sujet Marina Strategy for NL & Lab	
Solicitation No. - N° de l'invitation 3X004-070356/A	Amendment No. - N° modif. 001
Client Reference No. - N° de référence du client 3X004-070356	Date 2007-02-13
GETS Reference No. - N° de référence de SEAG PW-\$XAQ-031-3926	
File No. - N° de dossier XAQ-6-20429 (031)	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2007-02-19	Time Zone Fuseau horaire Newfoundland Standard Time NST
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Enquiries to: - Adresser toutes questions à: Baird, Janice	Buyer Id - Id de l'acheteur xaq031
Telephone No. - N° de téléphone (709) 772-2999 ()	FAX No. - N° de FAX (709) 772-4603
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction:	

Instructions: See Herein

Instructions: Voir aux présentes

Delivery Required - Livraison exigée	Delivery Offered - Livraison proposée
Vendor/Firm Name and Address Raison sociale et adresse du fournisseur/de l'entrepreneur	
Telephone No. - N° de téléphone Facsimile No. - N° de télécopieur	
Name and title of person authorized to sign on behalf of Vendor/Firm (type or print) Nom et titre de la personne autorisée à signer au nom du fournisseur/ de l'entrepreneur (taper ou écrire en caractères d'imprimerie)	
Signature	Date

This solicitation is amended to replace the Commercial General Liability Insurance clause in the document with the following:

Commercial General Liability Insurance

1. Commercial General Liability insurance shall be effected by the Contractor and maintained in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but, in any case, for a limit of liability NOT LESS THAN \$2,000,000 per accident or occurrence and in the annual aggregate.
2. The following endorsements must be included:
 - (a) Additional Insured: Canada is included as an additional insured, but only with respect to liabilities that may arise from the Contractor's own negligence in the performance of the Contract.

The interest of Canada as additional insured should read as follows: Canada, represented by Atlantic Canada Opportunities Agency and/or Public Works and Government Services Canada.
 - (b) Notice of Cancellation or Amendment: The Insurer agrees to provide the Contracting Authority thirty (30) days written notice of policy cancellation.
 - (c) Cross Liability: Without increasing the limit of liability, the policy shall protect all insured parties to the full extent of coverage provided. Further, the policy shall apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.
 - (d) Contractual Liability: The policy shall, on a blanket basis or by specific reference to this Contract, extend to assumed liabilities with respect to contractual insurance provisions.
 - (e) Contingent Employer's Liability: To protect the Contractor for liabilities arising in the management and administration of statutory and contractual entitlements of its employees.
 - (f) Employees and (where applicable) Volunteers as Additional Insured: All employees and (where applicable) volunteers, on behalf of the Contractor, shall be included as additional insured.
 - (g) Voluntary Medical Payments, \$5,000 per person, \$25,000 per accident: To provide for expenses incurred in instances of minor accidental bodily injuries without determination of liability.
 - (h) Non-owned Automobile: To protect the Contractor for liabilities arising by its use of vehicles owned by other parties.

(Derived from - Provenant de: G2001D, 10/06/05)

All other terms and conditions remain unchanged.

APPENDIX B

Ports Visits During Marina Study

Ports Visited During Marina Strategy Study

Admiral's Beach	Greenspond	Port aux Basques
Argentia	Harbour Breton (previous)	Portugal Cove South
Arnolds Cove	Harbour Grace	Port aux Choix
Bay Bulls	Hearts Content	Port Blandford
Bay de Verde	Heart's Delight-Islington	Port de Grave
Bay of Islands	Herring Neck	Port Kirwan
Bay Roberts	Hodge's Cove	Port Saunders
Belloram (previous)	Holyrood	Port Union
Bonavista	Kings Point	Ramea (previous)
Botwood	L'Anse aux Loup	Red Bay
Branch	La Scie	Renews
Brigus	Leading Ticks	Riverhead
Burgeo (previous)	Lewisporte	Rose Blanche (previous)
Carbonear	Long Cove	Salton's Brook
Carmanville	Long Harbour	Springdale
Catalina	Lumsden	St. Alban's (previous)
Clarenville	Mount Arlington Heights	St. Anthony
Codroy (previous)	Mount Carmel	St. Joseph's
Corner Brook	Musgrave Harbour	St. Bride's
Deep Cove	Musgrave Town	St. Mary's
Deer Lake	Norris Arm	Summerside / Irishtown
Dildo	O'Donnell's	Trepassey
Dunville	Old Perlican	Trinity
Durrell	Petley Marina	Triton
Embree	Placentia	Twillingate
Fermeuse	Plum Point	Valleyfield
Foxtrap	Point Leamington	Wesleyville
Glovertown	Poole's Cove (previous)	

APPENDIX C

Marina Inventory



Newfoundland and Labrador MARINA INVENTORY

2007

Marina Inventory

1. South Coast to Southern Shore
2. East and Northeast Coast
3. West Coast
4. Labrador

South Coast to Southern Shore

South Coast to Fortune Bay	Placentia Bay	St. Mary's Bay	Southern Shore
Port aux Basques	St. Lawrence	Branch	Trepassey
Grand Bruit	Burin	Mount Carmel	Portugal Cove South
Burgeo	Baine Harbour	St. Joseph's	Renews
Ramea	Arnold's Cove	O'Donnell's	Port Kirwan
Francois	Mount Arlington Hts.	Admiral's Beach	Fermeuse
St. Alban's	Long Harbour	Riverhead	Ferryland
Conne River	Argentia	St. Mary's	Bay Bulls
Hermitage	Dunville		St. John's
Harbour Breton	Jerseyside		Note: Gateways in bold.
Grand Bank	St. Bride's		
Fortune			

Port aux Basques

- Major national ferry terminal with associated facilities, town has range of services
- Existing floating docks for small fishing boats
- New marina planned, supported by Town, based on independent consultant study (being forwarded to Tract)
- Application made to ACOA for funding for: 24 berths, focus on national and international boaters, Washrooms, showers, laundry, associated parks development, lay-down area.



Grand Bruit

- Government wharf on the east side (approximately 125 feet long), docking place for the ferry / coastal boat.
- There is power to the dock.
- On the opposite side is a smaller fixed dock (70 feet), primarily used by local fishermen.
- As well, there is a floating dock, which is rather old.



Source: Blue Mountain Cabins website



Source: Blue Mountain Cabins website

Burgeo

- Fisherman's wharf, concrete topped and in good condition, 'L' shaped and approximately 180 feet in length.
- Used primarily by commercial boaters.
- Additional docking space is on the outside of the Travelift finger piers.
- Expansion room for at least four floating docks.
- Have a 50 ton Travelift. Although relatively small, laydown area had 14 boats over winter there last year.
- Expansion of laydown area is limited.

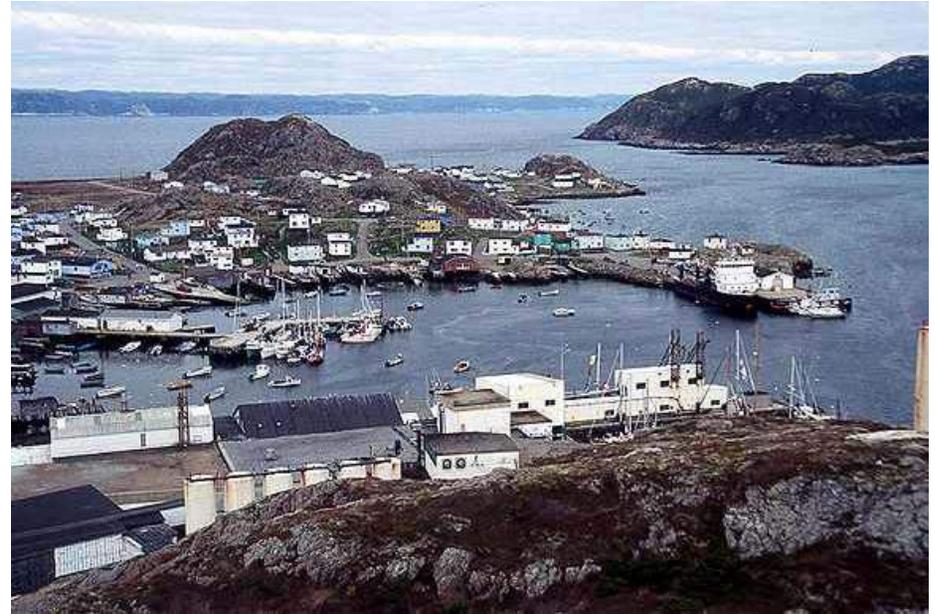


Source: Town website



Ramea

- Island located on south coast of NL
- Has dedicated ferry service
- Port visited by recreational boaters
- Some room for expansion
- Flotillas have visited area in the past



Francois

- Isolated community with well-protected harbour.
- Ferry wharf, floating docks used by local boats.
- Local convenience store but few other amenities.
- Very picturesque community gets regular visits by sailboats and yachts.



St. Alban's

- Port is located well away from headlands
- Potential conflict with aquaculture industry quickly developing in area
- A variety of services available in area
- Some marine service available
- Can accommodate a number of recreational boaters.

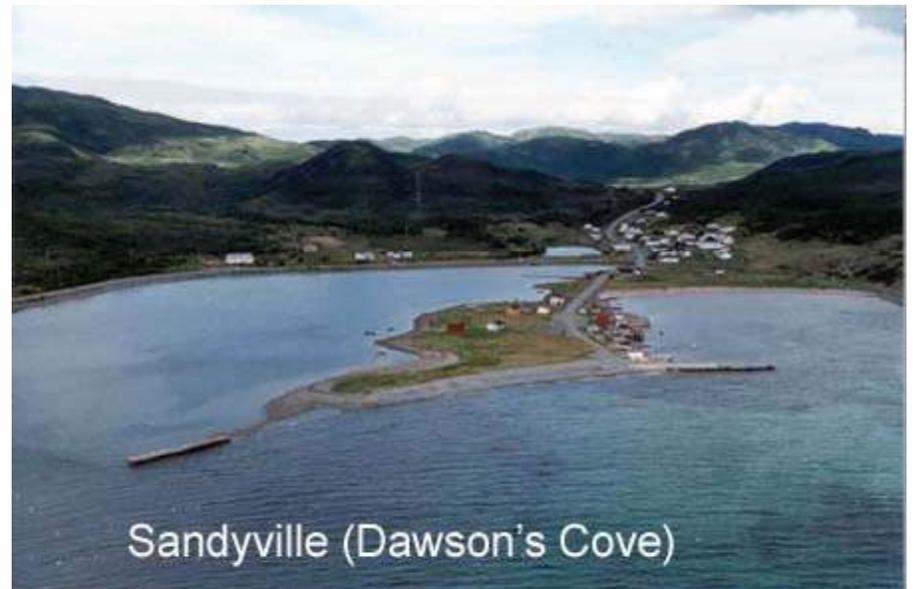


Conne River

Information not available

Hermitage

- Port has ability to handle over eight recreational boats at one time some recreational boaters.
- Fish plant and some marine service in the area.



Harbour Breton

- Protected harbour
- Elliott premises recently upgraded and can accommodate recreational boaters
- Some marine services and on-shore amenities
- Aquaculture developing



Source: Harbour Authority website

Grand Bank

- Developed fishing harbour.
- Existing small boat facility with floating docks used by fishing and recreational boats.
- Limited laydown area with potential for expansion.
- Services available nearby.
- Historic waterfront.



Fortune

- Good, well protected harbour.
- Currently have 15 floating docks, all with power and water. There are an additional 12 new floating docks in the water waiting to be installed in Fall 2007.
- There is a 300 foot marginal wharf on the east side.
- A large, level laydown area, serviced by a 150 ton Travelift .
- Managed by a Harbour Authority.
- Fortune has a customs office, located at the Transport Canada wharf.



St. Lawrence

- Sheltered harbour
- Active fishery.
- Some marine services available
- Various attractions and services available in Town.



Source: Harbour Authority website



Burin

- An older fixed dock in reasonable shape.
- Some distance from and parallel to it, is a newer fixed dock (approximately 250 feet in length), that was completed in 2006.
- Power & water to the fixed docks.
- Two floating docks are on the inside of the new dock and extend out from it.
- There is a haul out for smaller boats.
- Laydown space is limited.
- Harbour Authority office provides washrooms, showers and laundry facilities.
- Managed by Harbour Authority.



Baine Harbour

(no data collected)



Arnold's Cove

- Busy fishing harbour with lots of recreational boats;
- Some floating docks fixed to Government wharf;
- In a location protected from weather and sea, with close proximity to town services;
- Aesthetic potential but currently a little rough.



Mount Arlington Heights

- Finger on left of government wharf separated by length of breastwork from an angled wharf on the right;
- End of finger wharf is in disrepair and unsafe, and is closed off from use;
- Some fishing boats tied up at breastwork and at good section of wharf;
- Generally, there were several recreational power boats in the area, on collar.



Long Harbour

- Government wharf and associated building are decrepit and no longer in use; built on posts driven into the seabed;
- Enclosed in chain link fence, and signed “Danger Keep Off”;
- Located directly across from ERCO operations site, and the mine tailings that were dumped into the harbour are now about 400m across the harbour from the government wharf -- looks unattractive.



Argentia

- Large dock at ferry terminal not available to other boats; terminal building open only when ferry runs in summer months;
- About 100m away is a substantial installation of breastwork with five 35 ft finger piers running off perpendicular to the breastwork. These are all built at the same height, resulting in 20 ft-wide “pounds” which have room for two boats, side-by-side. Area is protected by a solid wood fence and is thus not visible from the terminal;
- Installation is unlike anything seen in the province’s harbours;
- No power or water to these docks; area is removed from any town services.



Dunville

- Government wharf in poor repair -- falling in;
- Several recreational power boats in the area generally;
- Location very quiet and beautiful -- long indraft of salt water arm, with town road running parallel to shoreline; several private docks;
- Challenge is getting from the arm out to Placentia Bay: must go under the lift bridge at Placentia, where there are also strong tides (local man said, in his boat going at 8 knots, it takes him an hour to get out, and if he happens to be going against the tide, his speed goes down to 4 knots).



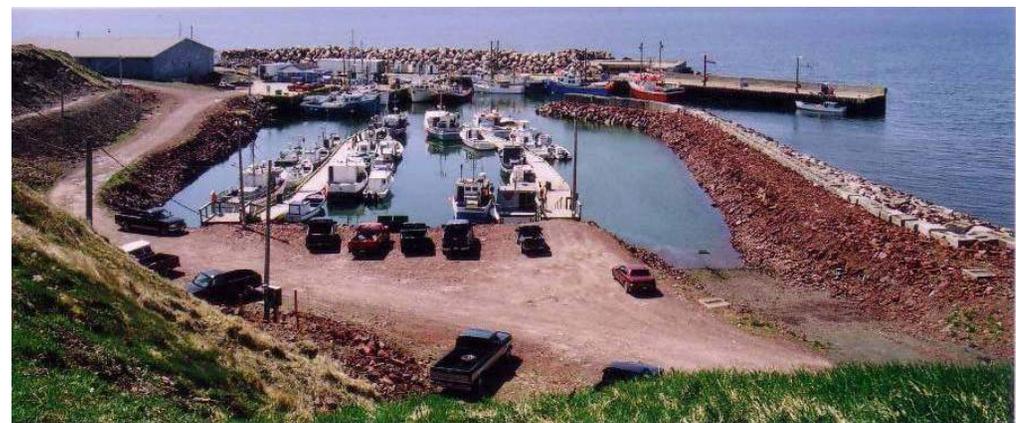
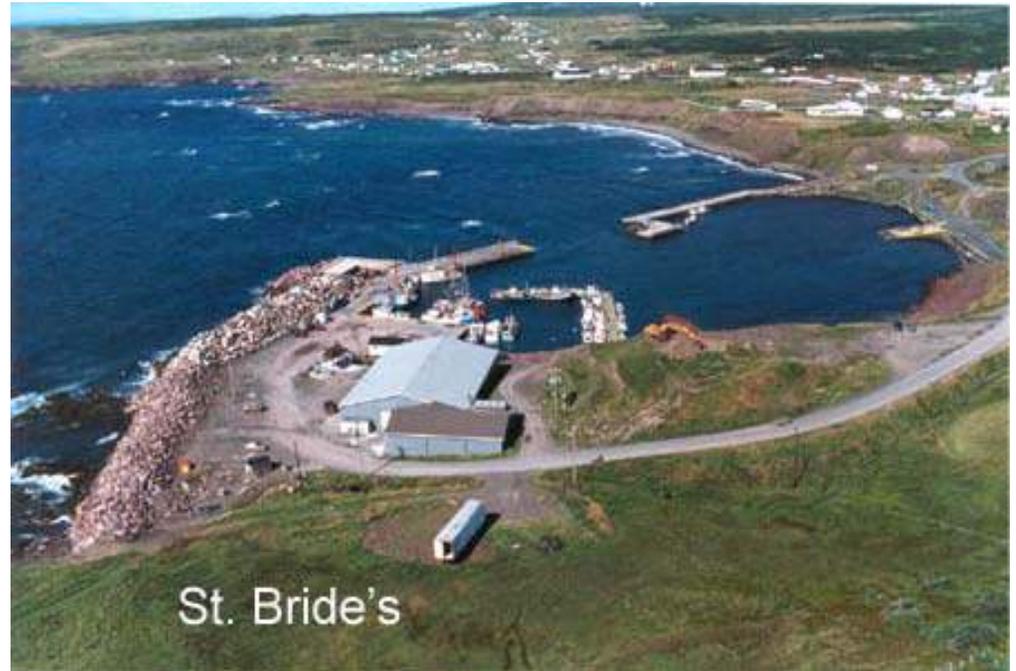
Jerseyside

- Adjacent to former fish plant, close to archeological dig.
- Need to access via lift bridge.
- Strong tides in area.
- Close to Placentia and various attractions and services in the community.



St. Bride's

- Very crowded and busy commercial harbour, but harbour space is small; many fishing boats were rafted to each other;
- Harbour has two breakwaters, staggered (one is sort of inside the other); long wharf outside the inner breakwater is in excellent condition, but is unused because there is no water at low tide (SCH white elephant?);
- There are two sections of floating docks, side-by-side, each with four sections of floating dock; power is available to the floating docks;
- There are plans to remove the bank adjacent to the harbour (\$8.5 million project) to increase the size of the harbour which is now operating at full capacity;
- Harbour Master said they get many recreational sail boats passing through for an overnight stay on their way along the coast, and these are welcome; they are open to receiving more such visitors.



Branch

- Harbour has two long breakwaters which form a channel leading to a small harbour;
- Harbour is a square shape, with three of the sides in breastwork; there were nine 45 ft longliners tied up when visited end-May;
- Power is available on these docks;
- Setting is right in midst of town and pleasant.



Mount Carmel

- Running eastward, in questionable condition;
- Unsightly industrial area: Large barge with two huge tanks tied up at wharf, with an old crane onboard -- “We harvest the purest water on Earth”.; a tug is rafted up next to this barge; lots of rusty industrial debris lying about the general area -- various pieces of large equipment, an old front end loader; a derelict other barge and two half-sunken tanks are on adjacent the beach; yard includes several old shipping containers, being used as sheds;
- This business apparently owned by Paddy Miller (Miller Industries Inc.);
- One fishing boat tied to other side of dock, plus two more (one a pleasure craft owned by the local priest) against some breastwork that is falling in.
- Little commend this site other than pleasant natural setting.



St. Joseph's

- A busy fishing port, owned privately by Daley Brothers Fish Plant. Spoke with one of the Daleys who spied us taking photos -- their wharf is private (big sign says so and bans tying up) and they want no recreational activity which might they feel would interfere with their business operations.



O'Donnell's

- A busy fishing port, owned privately by Daley Brothers Fish Plant. Spoke with one of the Daleys who spied us taking photos -- their wharf is private (big sign says so and bans tying up) and they want no recreational activity which might they feel would interfere with their business operations.



Admiral's Beach

- At end of road, on flat section of land at sea level;
- Marine centre with large building, paved laydown area, and Travelift;
- Also a wharf with a small fish plant; power on dock;
- Surrounding area looks sadly forlorn -- most buildings poorly kept.



Riverhead

- Good government breastwork wharf, being used by Beothic Fish Processors;
- Two sections of floating dock at one end of breastwork; power available;
- Five fishing boats tied up;
- Clean tidy premises, and whole area is paved;
- Long exposed sandbar acts as a breakwater.



St. Mary's

- Reasonable condition
Government wharf being used by Beothic Fish Processors; messy yard.
- Dock is fairly open and exposed to wind and wave.
- No boats tied up at wharf when visited end-May.
- Water / power on dock not obvious.
- Area feels removed from community, which includes many services.
- Project with ACOA for St. Mary's may actually be one proposed for Path End, which is at the end of Holyrood Pond and therefore inaccessible to ocean-going vessels.



Trepassey

Industrial Park Side: Long fixed government-type wharf, with 2 small long liners and 1 sailboat tied up; old fish plant abandoned and decrepit; two other new buildings alongside and in use.

Powles Point Peninsula: Very small wharf and not in good condition.

Harbour Authority Wharf: Fixed dock in good condition, with power;

- Area of fill leading to adjacent floating docks (two sections) suffered erosion from storms is closed off as unsafe;
- Breastwork between fixed and floating docks is broken and washed away;
- Some services available in town.



Portugal Cove South

- Very open bay, and although government wharf is protected by a concrete sea wall, locals say the wharf is not a good tie-up for extended periods;
- Attractive and tidy looking long building onshore by wharf (windows covered with panels of painted artwork);
- Big exposed rock off end of wharf;
- Slipway for small boats only;
- Suitable for overnight stop only.



Renews

- Government wharf with concrete surface and water but no power;
- NNW side is shoal, and prevailing weather is from same side;
- Two boats on collar off wharf because there is too little room on SE side;
- Stopover would mean rafting up to a fishing boat.



Port Kirwan

- Closer to open sea than Fermeuse and well protected around point;
- Government wharf is angle-shaped with power;
- All commercial but fishermen very friendly and receptive to recreational stopovers;
- Wharf gets lots of sailboats on stopover, which raft up to whatever boats are there, and this is not minded by owners.



Fermeuse

- By fish plant: Good, protected commercial harbour with approx. 25 fishing boats tied up; fish plant in operation;
- One km from fish plant: Short length of fixed wharf with four sections of floating docks added;
- Docks filled with all fishing boats, except one that looked to be recreational;
- Much work being done here by Seagull Construction for Small Craft Harbours: 3 new 20ft cribs in place and 3 more ready to be installed; aim is to add 300 ft length (spoke to security man on site);
- Big pile of rocks at one side probably for filling the cribs;
- Haulout on opposite side of harbour: Large paved laydown area used by whole area.
- Travelift, but no large building.



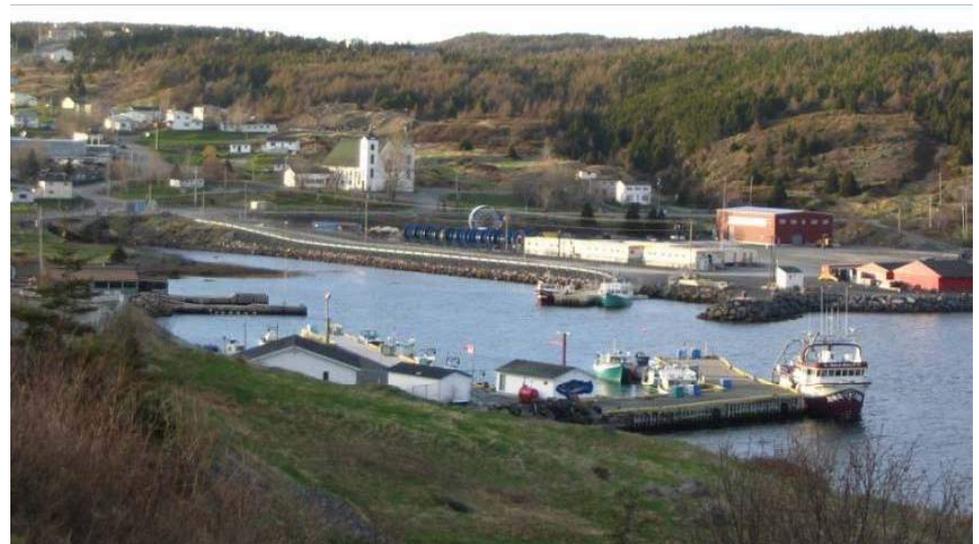
Ferryland

- Space for small fishing boats – not much room for expansion.
Infrequently used by recreational boaters.
- Close to Colony of Avalon, a popular visitor destination.



Bay Bulls

- Very clean government wharf site, with new work on slipway;
- Mostly used by fishing boats;
- Seems to be a little exposed to open water -- tour boats were docked across harbour at a new-looking short length of fixed dock, while their own docks on the government wharf side were empty; indicates that boats on Harbour Authority side of harbour may be subject to surge movement while tied up;
- Lots of town services available.
- New tourism master plan prepared that suggested extensive developments at waterfront.



St. John's

- Recreational sailboats use the floating docks at Harbourside Park.
- Larger yachts and power boats use the marginal wharf.
- Prosser's Rock is a very active fishing boat area – few recreational boats dock here.



East and Northeast Coast

Conception Bay	Trinity Bay	Bonavista Bay to Hamilton Sound	Notre Dame Bay	White Bay to Hare Bay
St. John's	Old Perlican	Bonavista	Herring Neck	Jackson's Arm
Long Pond	Hant's Harbour	Musgravetown (Deep Cove)	Twillingate/Durrell	Englee
Foxtrap	Winterton	Port Blandford	Moreton's Harbour	Croque
Holyrood	New Perlican	Salton's Brook	Bridgeport	St. Anthony
Brigus	Heart's Content	Glovertown	Embree	
Cupids	Heart's Delight-Islington	Greenspond	Lewisporte	
Port de Grave	Whiteway	Valleyfield	Botwood	
Bay Roberts	New Harbour	Lumsden	Norris Arm	
Harbour Grace	Dildo	Musgrave Harbour	Leading Ticks	
Carbonear	Long Cove	Carmanville	Triton	
Ochre Pit Cove	Sunnyside	Seldom	Springdale	
Bay de Verde	Hodge's Cove	Fogo	King's Point	Note: Gateways in bold.
	Clarenville		La Scie	
	Petley			
	Trinity			
	Port Union			
	Catalina			

Long Pond (Royal Nfld Yacht Club)

- Full service yacht club with clubhouse, Travelift, mast lifting crane, and boat storage
- Fixed wharf system utilizing a pile structure. Capacity for approx. 133 yachts.
- Berthing is side on and end on, depending on the size of the yacht. Many of the end on berths also have cat walks for easier access and safety. All berths have access to fresh water and power.

Source: www.rnyc.nf.ca



Foxtrap

- Well protected by a large breakwater / concrete surfaced marginal wharf.
- Primarily a recreational boating marina, with 70 boats at capacity.
- An excellent ramp permits easy launching for fairly large boats; however, larger and deeper boats can be craned in / out.
- Washroom and showers are available for users.
- Power is currently to the head of the floating docks, but plans are in place to extend it out to the end of the first floating section.
- Marina has limited opportunity for expansion.



Holyrood

- A large marina containing 100 recreational boats and at capacity.
- Consists of a large basin bounded on the east and west by a marginal wharf and an armour breakwater to the north.
- In addition to the marginal wharves there are two long fixed docks and a pier consisting of four floating docks.
- Large laydown area.
- Haul out ramp for smaller boats, larger boats craned out, although there is a pound for a Travelift.
- Ample room for expansion.
- Diesel and gasoline is available on site.
- Management is by the Holyrood Marina Park Corporation.



Brigus

- Picturesque setting in a historic community.
- No services.
- Existing private marina in Riverhead.
- Most of waterfront is private.



Cupids

- Site of historical interest (John Guy's Cupers Cove Colony in 1610 – the first successful English settlement in what would become Canada).
- Some recreational boaters visit this community.
- Old fish plant nearby.



Port de Grave

- Well protected harbour with a mix of fixed and floating docks serving fishing and recreational boats.
- The floating docks are taken up with recreational boats, although there are some smaller fishing boats present as well.
- On the west side there are four sections extending out from the marginal wharf, and on the east side there is another six sections of floating dock. Overall there is a considerable recreational component in the harbour.
- Power and water are brought to the head of the floating docks.
- Washrooms, showers and laundry facilities available at the Harbour Authority office.
- Inside the basin there is limited expansion potential, although there may be possibilities closer to the harbour entrance.



Bay Roberts

- A large fixed / breakwater wharf extends out from the marginal wharf in front of the Legion, and south of it there is another fixed dock that together create a fairly well protected basin.
- There is good berth space along the inside of the fixed dock,
- There are several floating docks with finger piers extending out from the larger fixed dock, giving more side on berth space.
- Harbour is filled to capacity by recreational boats; however, some expansion with addition floating docks is possible.
- Water and power is available at the dock, as well as washroom facilities inside the Legion when it is open.
- Marina is managed through the Legion.
- Many town amenities available to boaters.



Harbour Grace

- Well developed marina with fixed and floating docks.
- Slipway haul-out.
- Marina building with restaurant.
- General services across the harbour.
- Boat yard and Travelift across the harbour.



Carbonear

- Existing fixed wharf.
- Limited facilities for recreational boats.



Ochre Pit Cove



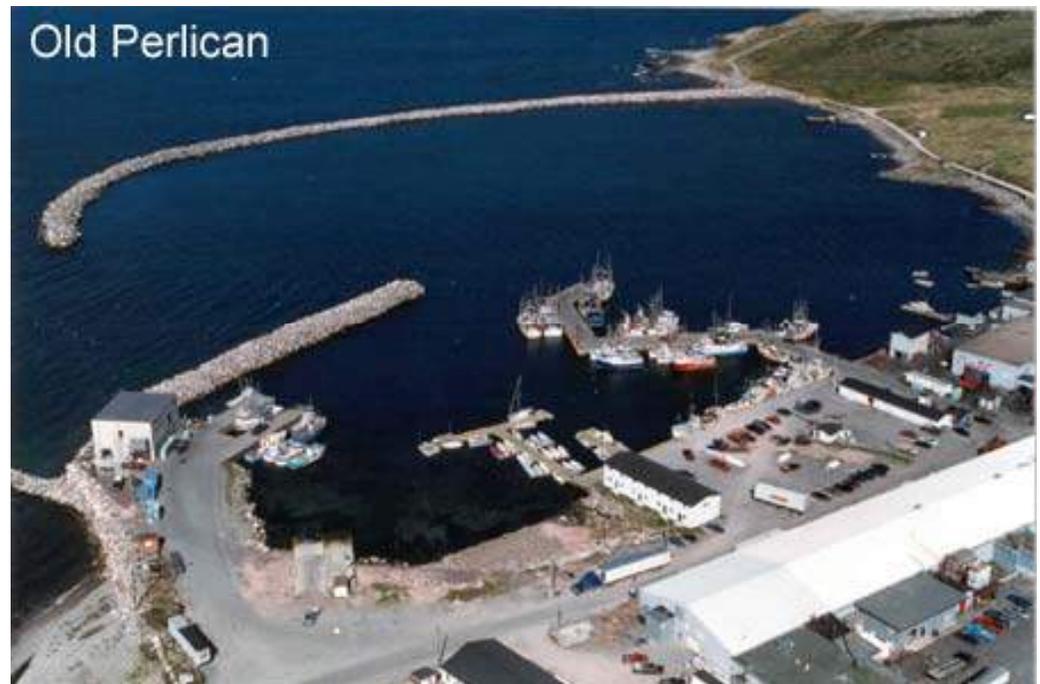
Bay de Verde

- Active fishing port with fixed and floating docks.
- Fish plant
- Limited general services in town.
- Limited laydown and expansion space.
- Strategic location for boaters travelling to and from Trinity Bay.



Old Perlican

- A large, busy fishing harbour, with limited opportunities for recreational boats to tie up to the fixed docks adjacent to the fish plant.
- Several sections of floating dock adjacent to the ice plant, with most space taken up by small fishing boats, although fishermen are amenable to rafting alongside. Power and water are not available on the floating docks.
- A Travelift and large shed with a good sized laydown area next to shed.
- Close to the shed is a chandlery or ship's store that carries a wide selection of boat items.
- On the north side of the harbour is a new fixed dock, occupied by large fishing boats. Water and power are available on this dock.
- There is a large laydown area on the north side.
- Good potential on the north side for floating dock expansion.
- Washrooms, showers and laundry facilities available at the Harbour Authority office.



Hant's Harbour



Winterton

- Existing fixed wharf used mainly by fishing boats.
- Fish plant and wharf.
- Nice location in a picturesque community.
- Not an all-weather location.



New Perlican



Heart's Content

- Existing fixed and floating docks used by fishing boats and small recreational craft.
- Picturesque location.
- Some general services in town.



Heart's Delight - Islington

- New floating docks with water / power;
- Funding sought for Phase 2 to increase capacity;
- Competent and committed volunteer management group in place from community;
- Zone 17 and other support in place;
- Services available in town.



Whiteway



New Harbour



Dildo

- Wharf in good repair.
- Harbour area small and little room for increasing space inside breakwater.
- Whole area is excellent condition.
- Services available in town, and restaurant on site.



Long Cove

- Extensive government wharfage with several floating docks.
- Mix of fishing vessels and recreational boats.
- Harbour very protected.
- Some capacity for size increase in berthage.
- Land acquired for increased laydown space (current space is fragmented and awkward for Travelift).
- Services available in town.



Sunnyside

- Incorporated NGO, independent of Harbour Authority, have been working on marina for 6 years.
- Marina under development, application made to ACOA for funding for: washrooms, showers, laundry, associated trail and picnic area being developed
- 20 current berths, waiting list of 2. Planned future capacity of 100.
- Sufficient dry land and winter storage
- Floating docks in excellent shape
- Electrical service
- Fuel truck comes to site
- No repair building, no boating club

Hodge's Cove

Information not available

Clarenville

- Years old and in good condition -- consists of four 54-ft dock sections as a main spine, with two perpendicular docks, each consisting of two 54 ft sections; security gate controls access to these docks.
- A new section of floating docks appears to have been installed recently, consisting of five lengths of 54-ft docks, with one perpendicular attachment consisting of two 54-ft docks.
- Some services available at dockside; all other services available in the community, including a well-known marine supply store (Mercer's Marine).
- Marina built and managed by the local Rotary Club.



Petley

- Breastwork on three sides enclosing a small square holding area for boats: one is public, the other, privately owned by Tom Mills.
- Public area is relatively shallow and has a long entrance about 15 ft wide; condition is derelict, breastwork is collapsing in places, and even repaired, capacity is limited.
- Mills' area is limited in the number and size of boats it can accommodate; expansion might be possible, but the expense would be considerable.
- Mills offers washrooms, showers, and laundry services; area is used by boaters mainly as a stopover.
- Jan Nygren runs a tour company out of here.



Trinity

- Currently has two floating docks which run off the breastwork in front of his restaurant; there are no plans to expand this.
- Andrews has also purchased the town's fixed dock (old government wharf?) which was in disrepair; plan is to repair it to accommodate larger power yachts, some of which have already visited Trinity (In 2006: about 8-10 US yachts, one over 140 ft long).
- Andrews feels more would come if the old dock were repaired and more inviting.
- Appears to be no opportunity for further development outside of this private business.



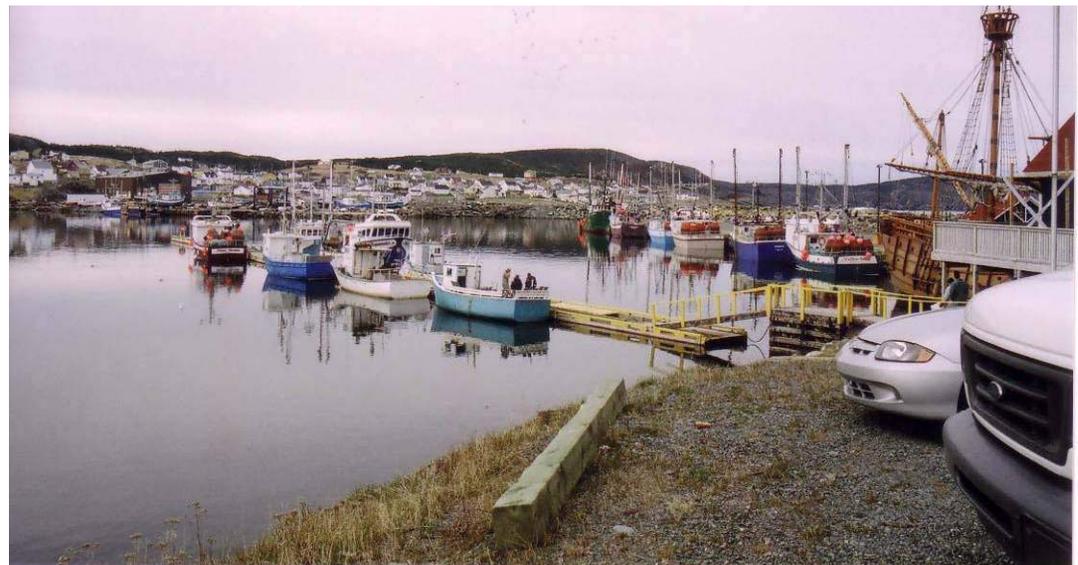
Catalina

- Used by smaller fishing boats and sometimes recreational boaters in summer.
- Have some “regular” boaters who stop by each summer on their way elsewhere.
- Floating docks damaged by ice winter 2007; repairs to be done by Small Craft Hrs.
- Not much capacity for (or interest in) expansion.



Bonavista

- Fishing harbour with six floating docks reserved for recreational boats (in season);
- Harbour Supervisor is excellent promoter, and ensures recreational boaters are welcome and assisted as needed;
- Proposals exist for increasing berth space for recreational boats in front of Matthew building;
- Receives lots of boats, locally and internationally, with larger power boats coming in recent years;
- Visitation increasing as much as 20-25% every year;
- Small Craft Harbours helps get things done.



Musgravetown (Deep Cove)

- Very secluded location, located at Deep Cove Road, off main road and safe from fetch and wind.
- Small breakwater provides added protection.
- Two x 54 ft sections of floating dock, with two single 54 ft sections attached at right angles to the left. Security gate blocks access to docks.
- Small laydown area; one power boat onshore.
- Two large buildings in cove, appear to be boat storage or work sheds.
- Private fixed dock opposite side of cove.
- Very quiet and pretty location.



Port Blandford

- Fixed dock located behind what looks like the municipal depot building.
- Breakwater located approx. 100-150m to the right may be sewage outfall cover(?).
- Small laydown area appears to be on fill; bank behind depot seems to be pushed down over the laydown area; looks untidy and will eventually encroach.
- Four floating docks stored onshore but difficult to tell where they are to be installed.
- Dock subject to broad expanse of open water with a long fetch from the NE and NW.
- No services available near dock area.



Salton's Brook

- Fixed dock is adequate as is.
- Currently used by many recreational boaters.
- Slipway on site
- On-shore amenities: trails, marine centre, crafts, playground.
- No marine services available



Glovertown

- Slipway and small boating area
- Adjacent to Terra Nova National Park
- New marina has been planned.



Greenspond

- Working fish plant, but little room for many boats.
- Access road, fish plant, and dock are all in one tight formation.
- Tricky entrance to harbour, but it is marked.
- Possibility for use as an overnight stopove.



Valleyfield

- Mostly breastwork inside a breakwater; very busy fishing port.
- Some floating docks for smaller boats.
- Harbour facilities include washrooms, showers, sitting room with kitchenette.
- Fuel delivery by truck can be arranged.
- Limited or no expansion room.



Lumsden

- Excellent harbour created by breakwaters, but crowded with fishing vessels.
- Some floating docks being used by smaller boats.
- Diesel available on the highway.
- Good location and facilities for a stopover port.



Musgrave Harbour

- Extensive breastwork with two fixed-dock fingers; room for lots of fishing boats, but no room for expansion -- rocky outcrops break out parallel to the breastwork.
- Large building looks like it should contain a Travelift.
- Laydown area is huge and all paved, but area is exposed, blustery and bleak.
- Boats stored on shore, incl. two sailboats whose owners live in Carmanville; few recreational boaters turn up in this harbour.
- Working fish plant (Beothic Fish Processors).



Carmanville

- Dock is in Carmanville South -- just a fixed breastwork which is pretty exposed.



Seldom

- Well protected harbour.
- Fixed marginal dock (65 feet) for recreational boating visitors.
- Dock higher than necessary, difficult to access wharf or board boat.
- Power and water available on the dock.
- Excellent washrooms and laundry facilities.
- Museum and craft store adjacent to wharf.



Fogo

- Town has expressed desire to develop new purpose built marina.
- A variety of tourism oriented developments taking place in Town.



Herring Neck

- Difficult to find -- consists of only a few houses (and no services) on the way to Hatchet Harbour and Salt Harbour.
- There is a dock on the Salt Harbour side, but nothing in Herring Neck.
- Suitable perhaps for moorings only, as the inlet is picturesque.
- A possible stop in a themed cruise for “Sir Wm. Coaker” (with Port Union?)



Twillingate / Durrell

- Fishing harbour, with government wharf and sections of floating dock. Waste from the fish plant makes a stay smelly and unpleasant.
- Excellent onshore facilities for boaters in Harbour Master's building: a sitting room with TV, kitchen facilities (incl. free coffee), coin-operated laundry, showers and washrooms.
- Excellent working marine centre with Travelift.
- The Harbour Authority is managing \$104,000 to improve two fixed docks on the north side with addition of several sections of floating dock, and dredging was ongoing throughout winter (2006-07).
- Smaller private wharf being developed nearby.
- Lots of boats stored onshore, incl. recreational.
- Durrell has a couple of pleasure craft from out of province that over-winter there.
- Marine services at Durrell to support marina at Twillingate



Moreton's Harbour

- A public wharf (114 feet) extends out from a marginal wharf on the west side of harbour.
- Water adjacent to marginal wharf most suitable for small boats.
- North side of wharf occupied by mooring lines for small boats.
- Wharf is also exposed to north east winds.



Bridgeport

- Fixed government wharf in good condition.
- Serviced with power and water.
- Two sections of floating dock on port side as you approach.
- Harbour Authority office.
- Good harbour and deep water.



Embree

- Government wharf is at end of Mason Street (off Water Street), but is in poor repair: crumbling concrete deck and whalers are off.
- Site is exposed and was in mid-May surrounded by Arctic ice.
- Lookout with raised deck and fencing on shoreline.
- Some small and exposed docks in town, appear to be private.



Lewisporte

- Existing large marina in place and being successfully managed by a marina committee.
- Close to capacity with plans for future expansion: Travelift being built and new floating docks awaiting installation to increase capacity.



Botwood

- Existing marina and Heritage Centre on site, in reasonably attractive setting.
- Marina protected by a long spit of land.
- Consists of one fixed dock and a set of floating docks: one main pontoon with five side docks off each side; 8 sections of floating dock were stored onshore, ready to be installed.



Norris Arm

- Possible site under development behind what appears to be the municipal depot.
- Part of Norris Arm Historic Site, where an annual flying boat festival is celebrated.
- Two new floating docks onshore, and a 50-70 ft gravel ramp was pushed out into the water, at right angles to the shoreline.
- Site has little wind or wave protection, and does not seem to be an optimal location for boats.



Leading Ticks

- Community very hilly and spread around the harbour with small government wharf.
- Town office reported that the “Marine Reserve” designation application is off -- too much opposition from local fishermen.
- Town Council planning the visit of a cruise ship, MV *Explorer* due Sept. 19th at the government wharf.
- 57 km by road from Botwood.



Triton

Green Bay Marine Centre: two large buildings, large paved laydown area, and Travelift; about 30 vessels stored here this past winter; over winter charge is \$200/month; Interpretation Centre is planned by the town adjacent to centre.

Triton harbour: about 2-3km down the road, with small government wharf in a small harbour where about 6 fishing vessels were tied up.

Recreational marina: built in 2006 located in cove adjacent to “Maple Ridge Coastal Hiking Trail”; floating docks and slipway, and a picnic area; berthing charge is \$200 per season for full-time boats and no daily charge for visitors. Lots of boats visit; docks owned by town and managed by the Tourism Committee.



Springdale

- Mostly private wharves, all in questionable repair but with good water depths.
- Lots of recreational boats onshore in cradles (in mid-May).
- Several slipways using railway tracks.
- Large government wharf in private hands but no evidence of ongoing work to upgrade.
- Current municipal political will is not pro-marina development.



King's Point

- T-shaped government wharf along main road, with laydown area adjacent.
- Small breakwater / slipway 100 m to south.
- Two private wharves along shore.
- Boatbuilding facility (Sea Serpent) with wharf in poor condition at bottom of harbour.
- Several large recreational power boats stored in cradles in this area (in mid-May).
- Town services include service station, café, pottery outlet, boat tours.



La Scie

- Good harbour; longliners tied up at government wharf at fish plant.
- L-shaped floating dock next to small slipway.
- Space available for extra floating docks for recreational traffic.
- New fixed dock / slipway opposite fish plant.
- Marine centre has Travelift, laydown area, and two large buildings for repair work.
- Town services include Irving station and ATM machine. “Lots of recreational boaters” pass through this harbour.



Jackson's Arm

Information not available

Englee

- Picturesque, sheltered harbour
- Plenty of room for recreational boaters with boat yard and haul-out, 2 Travelifts.
- Large sail boat from US has over-wintered here for two seasons
- Fisheries boat building centre. General services in town.



Croque

Information not available

St. Anthony

- Busy fishing wharf.
- Tour boats depart from Grenfell Historic Properties (lower image)
- Lack of facilities has meant that boats are sometimes turned away from docking.



West Coast

Bay St. George to Port au Port	Bay of Islands to Bonne Bay	Strait of Belle Isle to Hare Bay
Port au Basques	Corner Brook	Cow Head
Codroy	Summerside	Port Saunders
Stephenville	Deer Lake	Port au Choix
Long Point	Woody Point	St. Barbe
	Glenburnie	St. Anthony
	Norris Point	
		Note: Gateways in bold.

Codroy

- A hard surfaced wharf / breakwater extends out from Beach Point protecting the wharves behind it.
- A marginal wharf runs along the shore and at each end there is a substantial public wharf forming a small basin between them.
- Power and water is available on the wharves.



Stephenville

- Port has been divested to local authority.
- No accommodation for recreational boats. Port is a long sail from headlands which may deter boaters.



Source: Harbour Authority website



Source: Harbour Authority website

Port Harnum

Long Point (Beach Point)

- The harbour consists of a basin formed between the road from Lourdes to the northwest and a high rocky beach to the south east.
- On either side of the entrance to and protecting the basin are cribbed wharves.
- Water depth in the basin is limited, deeper water is inside and adjacent to the wharves. Some dredging may be helpful if boat traffic warrants it.
- Given that it is a long trip from either Port aux Basques or Codroy enroute to the Bay of Islands, Beach Point would make for an excellent night stop over.

Corner Brook (Bay of Islands Yacht Club)

- 60 berths, waiting list 7, no dedicated transient berths. Charge of \$100 to get on berth waitlist.
- Sufficient dry land and winter storage. Floating docks in excellent shape.
- 20amp service. Fuel truck comes to site, propane within 1km. Clubhouse with kitchen and bar can seat 99 and used for special events – books for boats.
- Lift-out is a new hydraulic trailer can handle up to 40'. No repair building, no boating club.
- Incorporated NGO, independent of Harbour Authority, Coast Guard Auxiliary uses and commercial boat tour uses and Bay of Islands Pilot.
- Wireless internet available 2007



Summerside/Irishtown

- Marina currently being expanded.
- Maximum build-out approximately 100 berths
- Should be developed in combination with Bay of Islands Marina to accommodate anticipated needs.
- Boats from France visited last year.
- Humber Valley resort looking for berthing space



Glenburnie

- Active fishing port
- No recreational boater
- Laydown area available
- Some marine service available



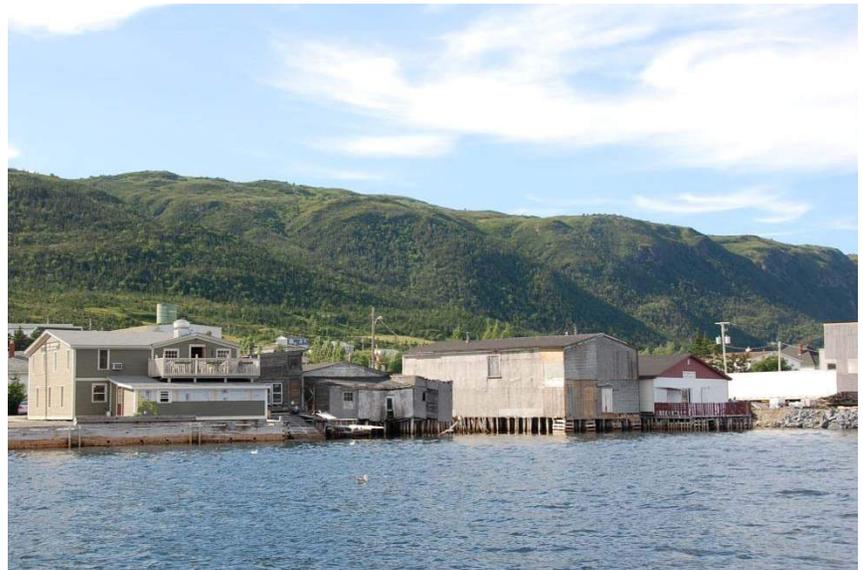
Norris Point

- Tier 1 Tourism Destination Area
- Memorial Biological station here
- Private group developing marina
- New marina proposed as per community tourism plan
- Large yachts and cruise ships regularly visit



Woody Point

- Active fish plant
- Some recreational boaters
- New floating docks for fishery/ recreational boaters developed
- Linked by water taxi from Norris Point



Cow Head

- Sheltered harbour.
- Current marina is focused on commercial fishery. Fixed wharves. Potential to accommodate pleasure craft and integrate with on shore activities – trail, camping, theatre.
- Building on site could readily be modified to incorporate on-shore activities and amenities – showers, laundry, etc.
- To our knowledge no application yet made to ACOA for funding.



Port au Choix

- Community has a National Historic Site.
- Some recreational boating and floating docks that can be expanded.
- Services nearby.
- Very active fishery.
- New breakwater being developed.



Port Saunders

- Large laydown area
- Large travel lift.
- Marine services available
- Currently several recreational boats stored here.
- Potential as future large yacht marine and laydown area.



St. Barbe

- Existing commercial harbour and ferry terminal for Labrador ferry.
- No recreational facilities at present.
- Secure harbour on stretch of coast without many harbours.
- General services in town nearby.



Labrador

Hare Bay to the Labrador Sea
St. Anthony
L'Anse au Loup
Red Bay
Mary's Harbour
Battle Harbour
Cartwright
Happy Valley-Goose Bay
Nain
Note: Gateways in bold.

L'Anse au Loup

- Existing fixed and floating docks service fishing and small recreational boats.
- Laydown area.
- General services in nearby town.
- Washrooms on site.



Red Bay

- Good harbour with no developed recreational boating facilities.
- Major tourist destination with on shore attractions and services.
- Visiting boats currently anchor in harbour.



Mary's Harbour

- New wharf development with staging for boat trips to Battle Harbour.



Battle Harbour

- Currently on itinerary of Cruising Club of America.
- Attractions include an award-winning historic site and orcas.
- Some limited services available to mariners



Cartwright

Information not available

Happy-Valley Goose Bay

- Large sheltered harbour
- Adjacent to Ferry terminal
- Some industrial activity
- A few pleasure craft and small boats present



Nain

- Many small fishing boats
- Shelter recreational boaters
- Active fish plant
- Floating docks possible
- Limited on-shore facilities
- Power and water available

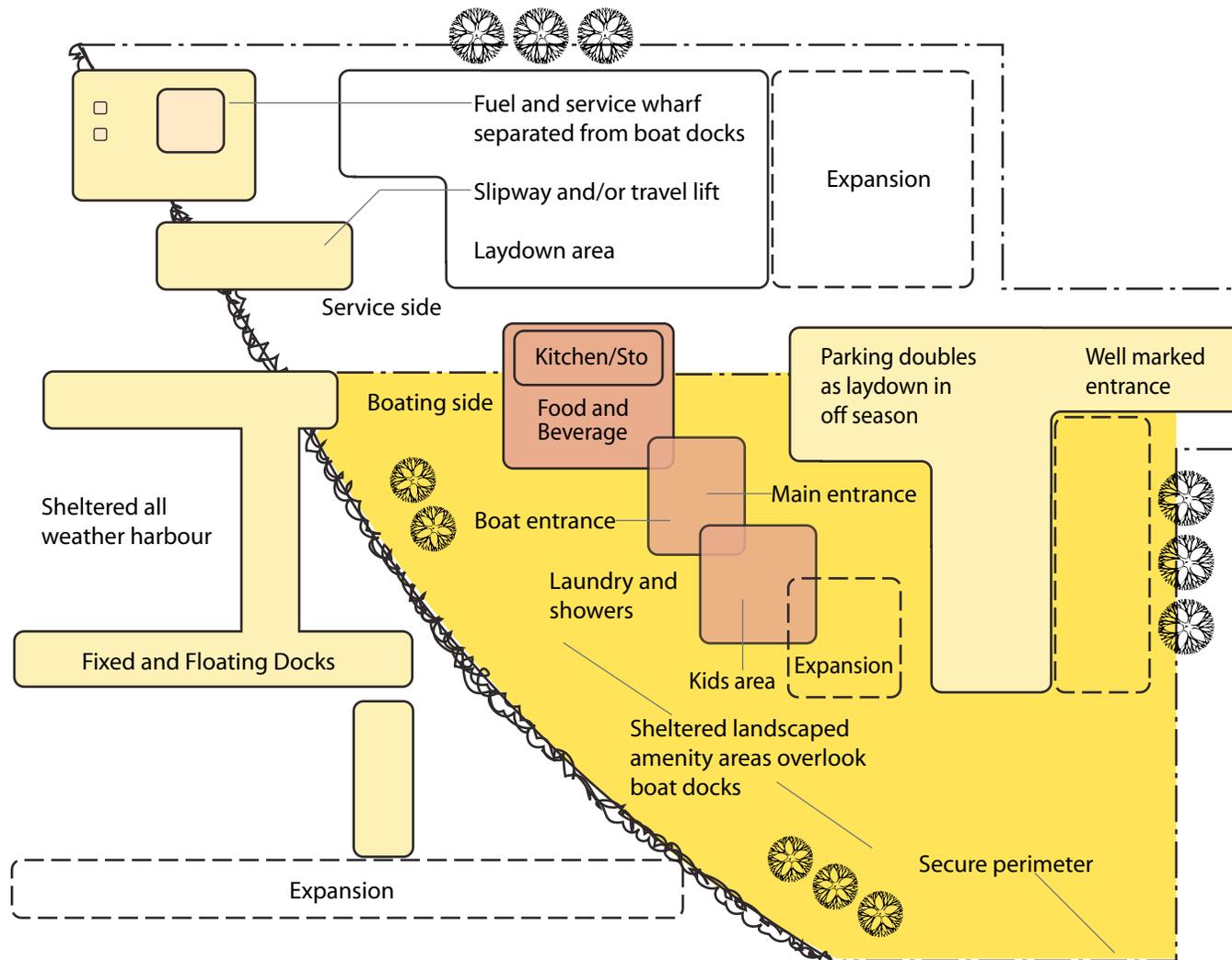


APPENDIX D

TIER 1 AND 2 PRODUCT DEVELOPMENT AREAS AND MARINAS 11 X 17

APPENDIX E

SCHEMATIC LAYOUT OF FULL SERVICE MARINA



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prepared for
 Government of Newfoundland and Labrador
 Newfoundland Labrador

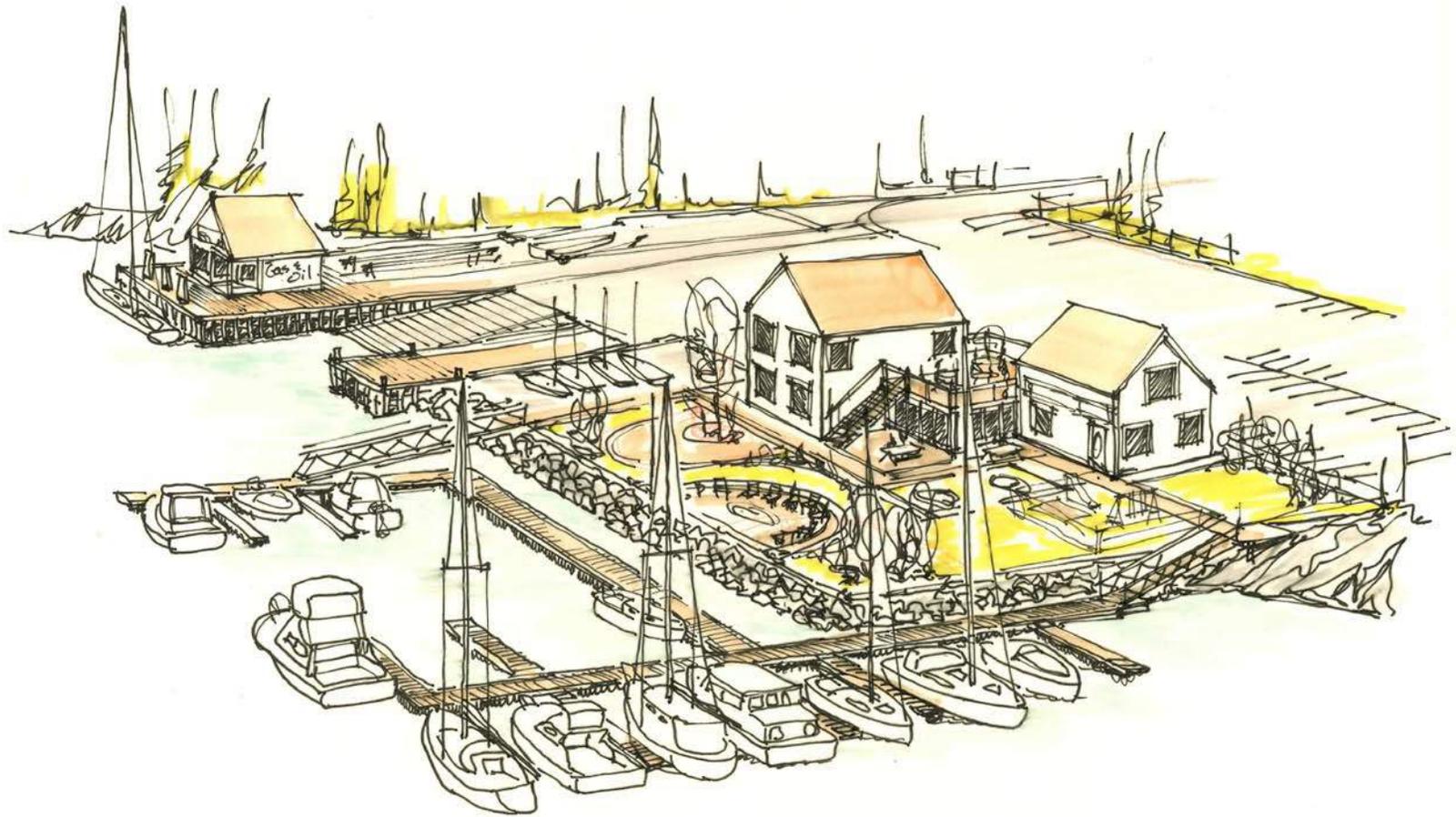
project
NL Marina Strategy

component
Schematic Layout of Full Service Marina

date
October 2007

APPENDIX F

MARINA CONCEPT SKETCH



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Marina Concept Sketch

date

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2007