

Preliminary opportunities for the
sustainable operation and
governance of
Port Dover Harbour Marina and
Port Rowan Harbour Marina

Norfolk County Marinas

Business Sustainability Plan
Update

June 2025

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1. Introduction

1.1 Background

Norfolk County has two municipally owned and operated marinas in its asset portfolio – Port Dover Harbour Marina (PDHM) and Port Rowan Harbour Marina (PRHM). Council has considered alternative ownership and governance options for these assets because the current annual revenue generated by the marinas is not sufficient to offset the capital investment they require over the next 10 years based on the Approved 2025-2034 Capital Budget and Plan. Although PDHM generates annual revenues that exceed operating costs, net profits are not sufficient to cover the deficit in capital investment required due to the time horizon available, with \$8M in projects currently scheduled in 2029. In October 2024, Council decided to retain ownership of both marinas, and during 2025 Levy Budget deliberations, Council voted to direct the net operating surplus generated by the marinas to the dedicated marinas reserve to support future capital improvements. Now, the direction is to develop a plan to make the marinas financially sustainable as a business unit, which means optimizing the revenue generating potential of PDHM, adequate reserve management, and removing the levy subsidy currently provided to PRHM.

This report outlines preliminary sustainability analysis findings that suggest a Municipal Development Corporation (MDC) could provide a viable path forward for marina operations. However, developing a comprehensive sustainability plan is premature. The County has retained Urban Metrics explore opportunities for operating the marinas under an MDC as part of a broader feasibility study and business case, expected in December 2025. Furthermore, Norfolk implemented a 25% increase in marina user fees for the 2025 season; the full impact of this change will not be known until the season concludes. Formal marina sustainability recommendations will depend on the consultant's findings and complete 2025 operational data, as these elements are critical to developing a meaningful sustainability strategy. Staff have prepared this report to update Council on preliminary findings and public engagement results, and to identify 2025 action items that will help establish the foundation for sustainable marina operations.

1.2 Methodology

This report was developed collaboratively with staff from across Norfolk County, including the Chief Administrative Officer, General Manager of Operations, Marina Manager, Finance and Economic Development staff, with research contributions from Norfolk County's summer students.

Public consultation was conducted in February 2025, with feedback integrated into report findings. To establish benchmarks and identify best practices, staff consulted with municipally-owned marinas throughout Ontario and privately-owned marinas within Norfolk County and across Ontario to conduct a comparative analysis of user fees and operational models.

Research methodology also included reviews of previous marina reports and strategies, complemented by site visits to both marina locations to assess implementation feasibility.

1.3 Assumptions

Retention Driver: Council retained ownership of Norfolk County's marinas because they value public access to Norfolk County's waterfront.

Models: The governance and operating models presented in September 2024 as Option 1 and 2 as outlined in 3.1.2 below are still under consideration.

Sustainability: Means that the marinas must generate sufficient revenue to cover both operating and on-going capital costs. This will ensure the operation can support the maintenance of the marinas through annual investment and contributions to reserves for asset management. This approach will enable safe operation without requiring support from the tax levy and/or non-marina users.

Surplus: Going forward, 100% of marina surpluses will be reinvested into marina operations and infrastructure through dedicated reserve funds.

Fees: Marina fee structures were previously based on market rate. Now, user fees are based on market rate and cost recovery for both operating and capital expenditures. Rates should be set to achieve financial sustainability while ensuring Norfolk's municipal marina fees are not the lowest among comparable services in the community. This approach avoids competing with private operators while accommodating more transient boaters during the summer season. From an economic development perspective, fluctuating vacancy rates support non-competition with private marinas and create opportunities to attract boaters from outside the County.

Expansion: Expanding marina operations and increasing service levels is not feasible under the current ownership and operating model due to municipal resourcing, processes, governance, and time constraints. Expansion into retail, rentals, and additional programming would need to be achieved through private investment/public-private partnerships, best facilitated through an MDC.

2. Executive Summary

Norfolk County Council retained ownership of both Port Dover Harbour Marina (PDHM) and Port Rowan Harbour Marina (PRHM) in October 2024, recognizing the need to address their long-term financial sustainability. This report presents preliminary findings from staff analysis, indicating that achieving marina sustainability will require innovative governance solutions and strategic partnerships that go beyond traditional municipal operations.

FINANCIAL SUSTAINABILITY CHALLENGE

The marinas face significant financial sustainability challenges that cannot be addressed with current revenue streams alone. PDHM generates an annual surplus (budgeted at \$786,400 in 2025), but requires \$14 million in capital investment through 2034, with \$12 million requiring debt financing. Assuming marina operations remained on the Levy with no change to the current financing structure, annual debt servicing costs would equate to annual average residential property tax increases of roughly 0.7% beginning in 2029 (assuming 20-year, semi-annual serial debentures at 4% on \$12

million). Critical infrastructure projects totaling \$8 million are scheduled for 2029, creating timeline pressure for sustainable funding solutions. PRHM operates at an annual deficit of \$126,500, requiring ongoing subsidy through the combined Marina Reserve. Without additional revenue streams or governance changes, the current model cannot support the capital investments required to maintain safe, functional marina operations.

PORT DOVER HARBOUR MARINA: Commercial Potential Requiring Partnerships

PDHM is a large marina with proven commercial viability, consistently generating annual surpluses. PDHM can accommodate larger sailboats and deeper-draft vessels that most other area marinas cannot, allowing it to serve a specialized market segment. PDHM has available space for development to increase revenue, including retail, food service, and potentially mixed-use residential development. However, realizing this revenue potential requires investment and operational flexibility that traditional municipal governance cannot provide. The County's financial constraints and competing infrastructure priorities make direct municipal investment in facility expansion difficult. New revenue-generating opportunities can only be achieved through public-private partnerships that offer business-focused decision-making and investment capital beyond current municipal capacity.

PORT ROWAN HARBOUR MARINA: Community Asset with Limited Commercial Potential

PRHM functions primarily as a community waterfront park with public pier access. Revenue generation opportunities are limited by the facility's small scale, passive operation, and infrastructure constraints. Required investments in dredging and pier maintenance cannot be recovered through realistic fee increases given the facility's service level and community function.

MUNICIPAL DEVELOPMENT CORPORATION: Emerging as the Preferred Solution

Staff analysis indicates that an MDC structure offers the most promising path to marina sustainability. An MDC would enable Norfolk County to maintain public ownership of the marina assets while providing the operational independence needed to pursue partnerships, attract private investment, and respond to market conditions with business-focused governance rather than municipal processes. PRHM may be better suited for integration with Norfolk County's parks system, recognizing its primary role as a public waterfront amenity. However, an MDC structure may provide greater flexibility to explore creative partnerships and alternative revenue streams that traditional municipal operations cannot pursue. The feasibility study and business case expected in December 2025 will provide the detailed analysis required to assess this governance model's viability and implementation requirements.

PUBLIC CONSULTATION INTEGRATION

An MDC governance model would also address feedback received during the February 2025 consultation process. Participants emphasized the need for different approaches for each marina, transparent financial management, facility improvements, and governance structures that incorporate community input while enabling operational changes. An MDC structure would provide the flexibility needed for partnerships to enable facility improvements and revenue generating

expansions while creating a governance framework that allows an advisory committee to provide input to an external Board of Directors, ensuring stakeholder engagement necessary for sustainability.

NEXT STEPS

Achieving marina sustainability will require strategic decisions that balance community values with financial realities. Traditional municipal governance cannot provide the flexibility and investment capacity needed for long-term sustainability without considerable additional investment by the County. An MDC structure could offer a promising solution that maintains public ownership while enabling the partnerships and operational independence essential for success. In 2025, staff are establishing the foundation for sustainable operations through comprehensive agreement reviews, site development assessments, operational data collection, and targeted marketing initiatives that will inform the transition and position both facilities for improved financial performance. Formal recommendations will follow the delivery of MDC feasibility study and review of 2025 operational data, providing Council with the information needed to guide marina governance, operation, and sustainability decisions.

3. Strategic Context

3.1 Previous Considerations

3.1.1 Previous Strategies

Norfolk County acquired Port Rowan Harbour Marina in the 1990s and Port Dover Harbour Marina in 2007. Since then, multiple reports and consultations have consistently recommended:

- Retaining both marina assets
- Improving revenue generation
- Prioritizing public access to waterfront
- Enhancing regional tourism opportunities

In 2014, Norfolk hired Marina Management Services to develop business plans for both marinas aimed at maximizing economic potential while meeting community needs. The study identified ways to:

- Attract boaters and non-boaters to the waterfront
- Enhance visitor experiences
- Extend tourist stays

Most improvement recommendations were not implemented due to resource constraints and uncertainty about the marinas' future. Recommendations that are still relevant/feasible have been integrated into this report.

3.1.2 Business Case Options

In September 2024, staff presented [Business Case Options](#) for the ownership and governance of Norfolk County's two municipally-owned marinas because their current combined annual revenue is not sufficient to offset the capital investment they require over the next 10 years. Options included:

OPTION 1: Public Ownership and Operation

Option 1.A – Municipally Owned and Operated

Option 1.B – Municipal Services Board

Option 1.C – Municipal Development Corporation

OPTION 2: Public Ownership and Private Operation

Option 2.A – Operating Contract

Option 2.B – Public-Private Partnership

Option 2.C – Cooperative

OPTION 3: Private Ownership and Operation

Option 3.A – Sale of Both Marinas

Option 3.B – Sale of One Marina

Option 3.C – Sale of Marinas, Retention of Waterfront

In October 2024, Council decided to retain ownership of both Norfolk County marinas, eliminating Option 3. In December 2024, Council approved the staff recommendation to reduce the marina capital forecast from \$21.5 million to \$14.7 million, and to increase marina user fees by 25% to improve cost recovery and to avoid competing with the private sector marinas in our area. In April 2025, Council reduced Port Rowan Harbour Marina launch ramp fees from \$30 to \$20.

3.2 Financial Position

3.2.1 Port Dover Harbour Marina

The 2025 Levy Operating Budget for Port Dover Harbour Marina includes total operating expenditures of **\$990,800**, with projected revenues of **\$1,777,200**—assuming optimal capacity and incorporating the **25% rate increase** implemented for the 2025 season. During budget deliberations, Council directed staff to **redirect the net levy contribution** from marina operations to support future capital initiatives. For 2025, this contribution is budgeted at **\$786,400**, although actual results will depend on utilization levels.

The County is also responsible for over **\$14.7 million** in capital improvements outlined in the approved 2025–2034 Capital Budget and Plan. Of this, **\$14 million is specific to PDHM**, with **\$12 million financed through debt** and **\$2.7 million** from the Marinas Reserve. These figures are based on reserve forecasts from the time of the Capital Plan's development and align with Norfolk County's Debt Management Strategy. Notably, **\$8 million in projects**—including wastewater system upgrades and full replacements of Docks 3 and 4—are scheduled for 2029. Financing strategies will continue to be reassessed as conditions evolve.

MOVING TOWARD FINANCIAL SUSTAINABILITY

Council has initiated a shift toward financial sustainability by eliminating the Levy subsidy from PDHM operations. This transition aims to shield taxpayers from the financial burden of marina operations, given the limited direct public benefit to the broader Norfolk County population. While this change resulted in a one-time increase to the general levy, it transfers the long-term responsibility for operational and capital funding to marina users.

PDHM's primary revenue sources include seasonal and transient dockage/slip rentals, winter storage, and ramp fees. Historically, rates were adjusted based on market comparisons and inflation. However, given Norfolk County's broader financial constraints, the fee structure now needs to balance market competitiveness with cost recovery, ensuring sustainability without driving customer attrition and diminishing returns.

REVENUE GROWTH AND INVESTMENT CONSIDERATIONS

Opportunities to grow marina revenue and enhance public access – such as service expansion or large-scale developments – must be weighed carefully. While such projects may generate positive long-term returns, they often require significant upfront investment, potentially delaying or displacing other critical infrastructure priorities (e.g., water/wastewater improvements) and placing additional pressure on the County's debt capacity and financial flexibility.

The proposed marina business sustainability plan aims to:

- Maintain **annual user fee increases** in line with inflation.
- Align PDHM rates with **comparable public-sector marinas** within and outside Norfolk County.
- Price services **at or above local private-sector marinas** to avoid direct competition.
- Maintain a **minimum reserve balance** to manage contingencies and support future development.

This approach is designed to ensure long-term operational viability while allowing for strategic reinvestment in PDHM infrastructure and services.

3.2.2 Port Rowan Harbour Marina

The 2025 Levy Operating Budget for Port Rowan Harbour Marina includes **total expenditures of \$181,000**, of which **\$78,000** is allocated to debt servicing for 10-year debentures issued in 2019 (maturing in 2029). **Budgeted revenues of \$113,300**, which reflect a **25% rate increase** for the 2025 season and assume optimal capacity, result in an **operating shortfall of \$67,700**.

Further, the budget includes a **\$58,800 contribution to reserves** to support future capital projects—such as dredging, East Side dock replacement, and pier lighting. Including this reserve transfer, the **total deficit rises to \$126,500**, which is currently being subsidized by Port Dover Harbour Marina (PDHM) operations through the Marinas Reserve.

FINANCIAL CONSTRAINTS AND STRUCTURAL CHALLENGES

PRHM's ability to generate revenue is significantly constrained by limited slip capacity, shallow channel depth, a smaller market base, and aging infrastructure. Without substantial investment or new revenue sources, the marina is unlikely to achieve break-even operations, even after existing debt is retired in 2029.

Additionally, the budget includes **\$62,900 in interdepartmental charges**, such as internal support services and a portion of the marina manager's salary. These allocations reflect internal cost-sharing; removing them from PRHM would not reduce overall County expenses, only redistribute them.

STRATEGIC DIRECTION AND SUSTAINABILITY CONSIDERATIONS

A realistic and sustainable financial strategy for PRHM may require ongoing Levy support in the near term to preserve this valued waterfront asset. While the long-term objective should be to move toward **break-even operations**, full financial independence may not be feasible given the current limitations.

Staff have received community feedback advocating for separating PRHM's financial reporting and operational planning from PDHM, recognizing the distinct challenges each site faces. Staff support this approach, and no immediate changes are recommended until the results of the MDC study.

3.2.3 Marinas Reserve Outlook

FINANCIAL SUSTAINABILITY AND CAPITAL PLANNING

Previous operating and reserve projections presented to Council reflected the position that, considering the County's current financial situation and the non-essential nature of the marinas, debt should be avoided completely to be truly self-sustaining. At that time, with a capital plan totaling **\$21.1 million**, no redirection of Net Levy surplus to reserves, and no increase to user fees, it was projected that reserve funding and debt servicing would become **unmanageable by 2029**—a year when major capital works are scheduled.

Since then, several key actions have been taken to improve the financial outlook:

- **Capital plan reduced** from \$21.1 million to \$14.7 million
- **Net Levy surplus redirected** to the Marinas Reserve
- **25% user fee increase** implemented for the 2025 season

These changes have significantly improved the reserve outlook, though the timeline remains too short to eliminate all debt financing.

CAUSES OF THE SHORTFALL

The funding gap stems from two primary factors:

1. **Escalating capital needs**, which have grown from **\$7.7 million in 2020** to **\$21.1 million in 2024**
2. **Shifting corporate priorities**, which limited the ability to consistently invest in marina reserves

Before 2020, Norfolk County's operations did not consistently generate surpluses, and some reserve funds were low or in deficit. While contributions to the individual PDHM and PRHM reserves were considered adequate at the time, they were based on historical capital needs and limited relative to broader County demands.

Through disciplined financial management and difficult decisions by Council over the past five years, the marina reserve position has improved significantly. However, given the scope of upcoming capital investments, a hybrid financing strategy will still be necessary, which includes debt financing. This should not be considered a long-term sustainability measure, but simply a reflection of the current constraints.

UPDATED RESERVE PROJECTIONS

Based on the current Approved 2025-2034 Capital Budget and Plan (\$14.7M) and the unaudited anticipated 2024 ending reserve balance (\$3.58M), revised Marinas Reserve Projections indicate that the 2029 Dock 3 & 4 Full Replacement (\$4.7M) scheduled in 2029 can be converted from debt to reserve funding and still satisfy reserve management objectives if operating conditions align.

This change is consistent with the County's broader debt avoidance strategy but also recognizes that it is not feasible to convert all asset management capital to reserves, as doing so would result in reserve deficits of \$2 million+ from 2029-2034 and is therefore not recommended.

KEY FINANCIAL SUSTAINABILITY OBJECTIVES

To ensure long-term financial sustainability, the following key financial performance indicators (KPIs) and principles will guide reserve and operational management:

- **Strategic balance between Reserve and Debt financing:**
 - Minimize debt use where possible to protect County borrowing capacity
 - Maintain a minimum reserve balance in any given year of \$500,000 for contingencies.
 - Target a 10-year ending balance of \$1,000,000 or greater to enable pursuit of strategic investment or development opportunities.
- **Rate setting strategy:**
 - Implement a transparent and consistent pricing strategy relative to comparable public and private marinas.
 - Target annual rate increases consistent with CPI to support inflation-adjusted sustainability
- **Slip vacancy management:**
 - Prioritize transient dockage to fill slip vacancies and promote tourism and support local economic development.

Due to the recent rate increases, coupled with unfavourable economic factors and weather conditions affecting the start of the 2025 boating season, 170 (37%) of the available 458 seasonal slips remain unsold (as of 21 May 2025). Given the level of uncertainty regarding future utilization given the changes occurring at the marinas, conservative revenue estimates have been used that incorporate a vacancy rate of between 10%-25% until 2028. Staff are working on a marketing strategy to attract more boaters to the marinas, which may help offset the temporary decline.

OPTIMIZED RESERVE PROJECTION

The table below outlines the projected financial position of the consolidated Marinas Reserve at key intervals—2025, 2029, and 2034—based on the current capital plan, projected revenues, and conservative utilization assumptions. It reflects an optimized funding strategy that balances reserve contributions from both Port Rowan and Port Dover Harbour Marinas, limited reliance on debt, and strategic timing of capital investments.

It is important to note that while this projection includes conservative assumptions, there is not a large margin for error, which further emphasizes the need to diversify revenue streams and explore other sustainability measures outlined within this report.

	2025	2029	2034
Opening Balance	3,580,016	4,781,354	872,132
Sources:			
PRHM Contributions	58,800	64,900	73,400
PDHM Surplus*	304,575	519,670	185,854
Interest Earned	112,747	191,254	34,885
Uses:			
Capital Commitments	(455,000)	(5,011,000)	(115,000)
Closing Balance	3,601,138	546,179	1,051,271

* Includes annual debt servicing costs of approximately \$550,000 for the remaining 2 projects (\$7.89 million) from 2030-2034 (assuming 20-year, semi-annual serial debentures at 4%)

3.3 Ongoing Initiatives

Asset Management Plan: Completed for all Norfolk County assets and current levels of service. Proposed levels of service and supporting financial strategy are expected in July 2025. Staff continue to integrate asset management collaboration and guidance into the budget process.

Recreation Master Plan: Approved in May 2025, recommends that Norfolk develop a Master Norfolk Waterfront Trails study to include all waterways, marinas, parks and green spaces to create a vision that will drive governance.

Facilities Review and Master Plan: Expected in September 2025, includes a review and rationalization of Norfolk’s administrative, operational, recreation, cultural, and emergency facilities. The marinas were not included in the scope of work, as they have been considered separately.

Municipal Development Corporation: Expected in December 2025, an MDC feasibility study and business case are under development. Managing the marinas through an MDC is being assessed as part of this review, and is likely the best avenue for success, as MDCs are able to function as and align with business process instead of municipal process.

Municipal Accommodation Tax: Expected in December 2025, a feasibility study and business case are under development. If deemed feasible and approved by Council, a MAT would be administered through an MDC to fund tourism initiatives. Specifically, a portion of MAT revenue could be used to fund marina improvements, (however, revenue would need to be used fairly across Norfolk communities).

4. Consultation

4.1 Community Engagement Summary

To inform this strategy, Norfolk County undertook community engagement in February 2025. An executive summary is included below. A more detailed summary of the feedback received, as well as the full survey results are available for review on the project’s [Engage Norfolk](https://engagenorfolk.ca/marinaengagement) page under “**Project Documents:**” engagenorfolk.ca/marinaengagement

4.1.1 Community Participation

- **4 Open Houses** (115+ attendees total):
 - Port Dover: 18 February, 40-50 attendees
 - Port Rowan: 25 February, 50-60 attendees
 - Simcoe: 26 February, 10 attendees
 - Virtual: 20 February, 3 attendees
- **142 Survey Responses:**
 - 50%+ from Port Dover (27%) or Port Rowan (27%)
 - 10% from Simcoe
 - 20% from across other Norfolk County communities
 - 20% from outside Norfolk County
 - 85% of respondents visit the marinas regularly
 - 38% are PDHM slip renters
 - 4% PRHM slip renters/boat house owners
- **3 Proposals** received from community members offering different approaches to marina sustainability

4.1.2 Key Messages

GOVERNANCE

- Support for treating each marina differently:
 - PDHM: Potential for a board or arms-length governance and operating model
 - PRHM: Preference for advisory committee structure
- Interest in local expertise and operational independence
- Governance structure should match the selected business model

FINANCIAL SUSTAINABILITY

- Retain marina surpluses in dedicated reserve funds (implemented in 2025)
- Opposition to large fee increases without service upgrades
- Explore revenue from events, rentals, and leases

FACILITY IMPROVEMENTS

- Upgrade docks, washrooms, Wi-Fi, and payment systems
- Improve fuel and pump-out services
- Expand and improve maintenance programs

COMMUNITY VALUE

- Marinas are viewed as significant contributors to area tourism and local business with recognized economic impact
- PDHM is viewed as a large marina / commercial operation
- PRHM is viewed as a waterfront park with community access
- Interest in youth engagement and seasonal events

IDEAS FOR SUSTAINABILITY

- Introduce retail, food, vendors, and rentals (e.g. kayak, paddleboard, dinghy)
- Host events (e.g. markets, concerts)
- Use seasonal passes and improve promotion/advertising
- Explore partnerships to enhance services and amenities
- Expand winter storage and remove/sell abandoned derelict boats
- Improve lease management (i.e. Boat Houses; Giles Marine)
- Explore development opportunities to increase revenue
- Consider mixed-use development concepts (e.g. residential)

TOP RECOMMENDATIONS

- Develop separate business plans for each marina
- Reinvest surplus into marina infrastructure and improve amenities
- Create inclusive, locally-informed governance models
- Expand non-user fee-based revenue sources (i.e. retail, rentals, restaurant, residential)
- Ensure transparent and accountable financial management
- Develop long-term vision that integrates marinas into waterfront development

4.1.3 What We Learned

Community engagement participants strongly support maintaining and enhancing both marinas while recognizing their distinct characteristics and operational requirements. Feedback consistently emphasized the need for different management approaches tailored to each marina's unique amenities, limitations, and their role in the community:

Port Dover Harbour Marina is viewed as “**a large marina with a small park,**” with stronger commercial potential, with stakeholders favoring an external management model that incorporates:

- Local/user representation on an external board
- Opportunities for public-private partnerships
- Strategic investments in facility improvements and expanded service offerings
- A business and governance structure that enables revenue generation for sustainability that could include mixed use commercial and residential development on site

Port Rowan Harbour Marina is primarily viewed as “**a small marina with a large park,**” a community waterfront park with a public pier and small boat harbor that:

- Should operate under different expectations than Port Dover
- Functions as a public waterfront community asset
- Requires taxpayer support
- Could benefit from integration with Norfolk County's parks system with local advisory input

Stakeholders consistently expressed:

- Desire for marina surplus to be reinvested into the marinas
- Concerns about financial management, transparency, and accountability
- Concerns regarding facility maintenance and infrastructure
- Resistance to substantial fee increases without facility and service improvements
- Support for developing separate business plans with appropriate governance models

Participants recommend:

- Creating governance structures that incorporate stakeholder input
- Expanding revenue-generating offerings beyond fee increases
- Integrating the marinas with broader community, economic development, recreation, waterfront, and tourism strategies
- Ensuring transparent financial management with any surplus reinvested into marina improvements

4.2 Best Practices

4.2.1 Current Market

MARINA FEE AND VACANCY UPDATE – 2025 SEASON

Staff reached out to all private marinas operating in Norfolk County to gather information on 2025 slip fees and vacancy rates for comparison. Respondents confirmed that the marina industry is experiencing a significant downturn. The 2025 season has started slowly, largely due to economic

challenges, unseasonably cold weather, and [low water levels affecting all Great Lakes for the first time in over a decade](#). Vacancy rates vary widely across the area: one marina reported over 80% of slips still available, while others have smaller vacancy rates of 10% to 20%, which they expect to fill by the end of June. As of late May, only one marina in the area reported reaching full capacity.

As of late May 2025, approximately 170 seasonal slips (37% of capacity) remain unrented at PDHM, compared to 68 vacancies (15% of capacity) during the same period in 2024. This represents a shortfall of approximately 100 slips compared to the previous year, with projected revenue impact of approximately \$350,000 compared to budget if these slips remain unfilled. However, due to the 25% fee increase implemented to improve capital and operating cost recovery, current seasonal dockage revenue is only 6.7% below the 2024 season total. The occupancy decline is partially attributable to this fee increase, which has been exacerbated by the sector-wide slump caused by the current economic climate affecting discretionary spending on recreational boating. Fewer seasonal boaters will likely impact ancillary service revenue at the marina as well, though the full impact remains unknown at this time.

In terms of pricing, most marinas have either frozen their 2024 rates or introduced only modest increases – typically less than 5% – for the 2025 season. Some operators are postponing rate hikes until 2026 to respond to inflationary pressures. In contrast, Norfolk County implemented a recommended 25% increase to most user fees for the Port Dover and Port Rowan marinas in 2025. This decision, based on projections presented in late 2024, aimed to maintain debt-free operations. Although the new rates remain within the range charged by comparable marinas for similar slip sizes, public feedback and early-season trends indicate that such substantial increases without corresponding upgrades to amenities are likely to reduce demand and threaten long-term financial sustainability.

This situation limits the extent to which marina operations can be subsidized solely through user fees, highlighting the urgent need to identify new revenue sources and operational efficiencies. These challenges and potential solutions will be explored further in this report.

Norfolk County remains committed to using market rates as the foundation for setting marina fees and acknowledges the need for a more transparent and structured pricing approach moving forward. The County must strike a balance between avoiding direct competition with local private marinas and maintaining competitive rates in line with marinas outside Norfolk County.

KEY ELEMENTS OF RECOMMENDED PRICING APPROACH:

Market Research – Competitive Rate Survey

- **Local Private Marinas:** Conducted a pricing survey of five comparable privately owned marinas located in Norfolk County. *Note: These marinas have requested anonymity.*
- **Marinas Outside Norfolk County (some of which are Municipally owned):** Surveyed the following marinas located outside Norfolk County to gather rate data:
 - **Lake Erie**
 - Port Colborne – Sugarloaf Marina
 - Leamington – Leamington Municipal Marina

- Erieau – Erieau Marina
- **Lake Ontario**
 - Hamilton – Harbour West Marina
 - Hamilton – Fifty Point Conservation Area Marina
 - St. Catharines – Port Dalhousie Pier Marina
- **Rate Comparison and Analysis:** Identify **high, low, median** and **average** slip rental rates across surveyed marinas, categorized by boat size and service level:
 - 23' boat – unserviced dock
 - 27' boat – serviced dock
 - 30' boat – serviced dock
 - 35' boat – serviced dock
 - 45' boat – serviced dock

Target Rate Calculation

- **Local Private Sector Benchmark:** Calculate a private marina target rate using the **average private sector rate**.
- **Marinas Outside Norfolk County Benchmark:** Calculate a target rate using the **average rate for marinas outside Norfolk**.
- **Blended Target Rate:** Apply a **weighted average** formula to establish a recommended rate:
 - 45% Local Private Sector Average Rate
 - 55% Average Rate Outside Norfolk County
 - This split reflects the current composition of seasonal slip holders at the PDHM.
- **Rate Adjustment Recommendations:**
 - Compare calculated target rates to current PDHM (Port Dover Harbour Marina) rates by boat category.
 - Recommend adjustments where the variance exceeds **±10%**.

4.2.2 Port Dover Harbour Marina Fee Comparators

SELECTION CRITERIA FOR COMPARABLE MARINAS

To enhance transparency and ensure consistency in setting future dockage rates, the following criteria were used to select comparable marinas:

Private Marinas in Norfolk County

- Staff contacted all 13 privately operated marinas within Norfolk County for fee comparison.
- Of these, 7 responded, and 5 were selected as direct comparators to Port Dover Harbour Marina for their larger slip capacity, ability to accommodate larger boats, and similar on-site amenities.

Marinas Outside Norfolk County

- **Boat Accommodation Capabilities:**
 - Must be able to accommodate **larger vessels (over 40')** and **sailboats**, reflecting a key feature of PDHM.
- **Marina Size and Capacity:**
 - Marinas must have a **minimum of 250 slips** to ensure comparability in scale and operational complexity.
- **Amenities Considered Essential for Comparison:**
 - The following amenities were prioritized based on the value they provide to marina users:
 - Electrical service (30–50 amp availability)
 - Washroom, shower, and laundry facilities
 - On-site gas dock
 - Wireless internet access
 - Pump-out station
 - On-site winter boat storage
- **Community Profile:**
 - Marinas located in communities with **similar characteristics** to Norfolk County were prioritized to ensure contextual relevance.
 - Additionally, for contrast, and to represent the broader market, **select marinas located on the shores of Lake Ontario** have also been included as approximately 20% of current slip holders are from areas such as Brantford, Hamilton, Stoney Creek, Burlington, and St. Catharines.

The following table compares dockage rates from **local private marinas** and marinas **outside Norfolk County** to PDHM's current rates based on:

- **\$/Ft:** Cost per foot of boat length. These rates do not include HST to provide a more direct comparison to posted user fee rates for PDHM. Due to some pricing being expressed as a flat rate, the implied \$/ft was calculated based on the maximum boat size that could be accommodated, which was either explicitly stated or assumed based on the slip size.
- **\$/Slip:** Total cost per slip. These costs include HST to reflect the full cost that would be paid at each marina for each boat size. Results are summarized based on the observed **high, low, average, and median** rates against current PDHM rates. Included in the analysis are both the average and median to reduce the effect of outliers. The weighted average target rate is based on the stated 45% local average and 55% average for marinas outside Norfolk County. The WA Target \$/Slip was calculated, and the \$/ft. is implied based on the maximum boat size for each slip at the PDHM.

Local Privately Owned Marinas								
	HIGH		LOW		AVERAGE		MEDIAN	
	\$/Ft	\$/Slip	\$/Ft	\$/Slip	\$/Ft	\$/Slip	\$/Ft	\$/Slip
Unserviced Slip	74.97	2,965.00	36.36	904.00	54.05	1,832.98	58.76	1,921.00
Serviced - Up to 27'	97.07	3,839.01	48.33	1,638.50	79.44	2,830.14	83.43	2,833.45
Serviced - Up to 30'	97.07	3,839.01	48.33	1,638.50	80.16	3,015.75	83.43	3,127.28
Serviced - Up to 35'	97.07	4,435.25	76.09	3,084.90	84.84	3,689.85	83.59	3,713.38
Serviced - Up to 45'	100.47	5,109.00	76.09	3,955.00	87.30	4,499.75	85.33	4,435.25
Marinas Outside Norfolk County								
	HIGH		LOW		AVERAGE		MEDIAN	
	\$/Ft	\$/Slip	\$/Ft	\$/Slip	\$/Ft	\$/Slip	\$/Ft	\$/Slip
Unserviced Slip	92.00	2,211.41	57.75	1,239.89	70.37	1,736.75	67.48	1,910.27
Serviced - Up to 27'	126.00	3,844.26	47.00	988.75	81.00	2,418.19	73.50	2,159.43
Serviced - Up to 30'	126.00	4,520.00	55.00	2,045.30	93.57	3,315.27	96.21	3,363.98
Serviced - Up to 35'	126.00	4,983.30	55.00	2,412.55	95.78	3,749.43	103.03	3,842.00
Serviced - Up to 45'	126.00	6,407.10	55.00	3,226.15	100.07	5,174.63	106.32	5,406.20
	PDHM		WA Target Rate		Variance from Target Rate			
	\$/Ft	\$/Slip	\$/Ft	\$/Slip	\$/Ft	\$/Slip	%	
Unserviced Slip	74.30	1,931.17	68.49	1,780.06	5.81	151.11	7.8%	
Serviced - Up to 27'	97.00	2,959.47	85.33	2,603.57	11.67	355.90	12.0%	
Serviced - Up to 30'	97.00	3,288.30	93.82	3,180.49	3.18	107.81	3.3%	
Serviced - Up to 35'	97.00	3,836.35	94.12	3,722.62	2.88	113.73	3.0%	
Serviced - Up to 45'	114.00	5,796.90	95.79	4,870.94	18.21	925.96	16.0%	

KEY FINDINGS – PDHM RATE COMPARISON AND ANALYSIS

- **Unserviced Slips**
 - **7.8% above** the market target
 - **Within acceptable range**, but slightly high
 - *Recommendation: Monitor* pricing to ensure continued competitiveness
- **Serviced Slips – Up to 27'**
 - **12.0% above** the target
 - Just over the upper limit of acceptable variance
 - *Recommendation: Consider a small rate reduction for 2026 season* specific to this category or maintain cautiously pending the outcome of 2025 season. Specific rate adjustments would require a change to the current fee structure.
- **Serviced Slips – Up to 30'**
 - **3.3% above** target
 - Well within market range
 - *Recommendation: Maintain current rate*
- **Serviced Slips – Up to 35'**
 - **3.0% above** target
 - Very well aligned with market pricing
 - *Recommendation: Maintain current rate*

- **Serviced Slips – Up to 45’**
 - **16.0% above** target
 - Significantly overpriced
 - *Recommendation: Consider Reducing rates* for large boats **in 2026** to improve fairness and market appeal pending the outcome of the 2025 season and overall market trends for next year.

OVERALL SUMMARY

The analysis shows that **PDHM’s current pricing structure is largely in line with market conditions** for the majority of slip categories—particularly in the **core 30’–35’ serviced slip range**, which represents nearly 60% of the marina’s slip inventory. This alignment suggests that PDHM is reasonably positioned to retain and attract boaters in this popular size segment, contributing to stable occupancy and revenue over the long-term.

However, the analysis also reveals pricing misalignments at both ends of the slip size spectrum:

- **Unserviced slips** are priced moderately above market (+7.8%). While still within a tolerable range, this could deter price-sensitive customers seeking basic accommodations. A modest rate adjustment or added value may help justify current pricing.
- **Serviced slips for smaller vessels (up to 27’)** just exceeds the upper limit of acceptable variance (+12%). The rate is high enough to potentially reduce price competitiveness with comparable marinas.
- **Serviced slips for larger vessels (up to 45’)** show a significant overpricing issue (+16%). These slips are likely **less attractive to larger boaters** who have access to more competitively priced options nearby. This pricing gap could hinder occupancy and long-term revenue in this category.

A contributing factor is the difference in pricing models: many marinas use a **flat rate per slip**, while PDHM employs a **per-foot pricing structure**. This can result in **higher fees at PDHM for smaller boats**, particularly when customers are paying per foot in slips designed for larger vessels. For example, docking a 30’ boat in a 35’ flat-rate slip at another marina may offer better value compared to PDHM, where the fee would be based on every foot of the vessel’s length.

To create better value for boaters and ensure a more equitable pricing structure, consider implementing a tiered pricing system based on boat or slip size. The current model applies minimum boat sizes for certain docks but maintains a flat rate per foot, which may not appropriately reflect the value of different dock types. The following is an example of what a tiered approach might look like based on the observed Target Pricing:

- 23’ slips (Docks 1 & 2) – Maximum 27’ Boat Length - \$85/ft.
- 26’ slips (Docks 1 & 2) – Maximum 30’ Boat Length - \$94ft.
- 30’ slips (Docks 1-4) - Maximum 35’ Boat Length - \$94/ft.
- 35’ slips (Dock 5) - Maximum Boat Length greater than 35’ - \$96/ft.
- Unserved slips (Dock 6) - Maximum 23’ Boat Length - \$70/ft.

Given that current rates appear to be more competitive with marinas located outside Norfolk County, Council could consider implementing a discount of 10%-15% to residents of Norfolk County on seasonal dockage. Staff could also investigate bundling of services, such as winter storage, to create additional value for slip holders in lieu of rate adjustments. This assumes additional capacity is available to accommodate an increase in service level.

Due to pending decisions regarding potential transition to an MDC governance model and incomplete data on the 2025 season given that it is only May at the time of this report, current recommendations and modelling include status quo user fees for at least the 2025 season. Staff will incorporate any direction received on 2026 rates into the user fee update in the fall, which will be applied to the 2026 Budget.

4.2.3 Port Rowan Harbour Marina Fee Comparators

SELECTION CRITERIA FOR COMPARABLE MARINAS

Norfolk County Private Marinas:

- **3 area marinas** with similar slip sizes that accommodate smaller boats (maximum 28/ft) with shallow harbors were used as comparators.

Municipal Marina Comparators:

- **Wellington Marina: Prince Edward County**
 - Small passive 14-slip operation with no staff, minimal hydro capacity and minimal amenities;
 - High value to the community with an annual wait list for slip rentals
- **Peterborough Marina: Peterborough**
 - 100 slip marina; 35 slips are seasonal, remainder are transient
 - Publicly accessible marina with high value to the community, including heritage features and significant tourism draw, located in a community park with regular summer events and concerts
 - Marina is fully staffed and offers services and has hydro and water available
 - Comparable seasonal pricing below is for an serviced slip with no hydro for boats between 18 and 30 feet for comparison purposes

PRHM MARINA FEE COMPARISON				
Marina	Location	Seasonal Slip	Daily Transient	Ramp
Port Rowan Harbour Marina	Lake Erie: Port Rowan	\$992-\$1,102	\$2.00/ft	\$20
Norfolk Area Marinas	Lake Erie: Norfolk County	\$1,000-\$1,450	N/A	\$20
Wellington Marina	Lake Ontario: Wellington	\$1,700	N/A	N/A
Peterborough Marina	Little Lake: Peterborough	\$1200-\$1,700	\$2.10/ft	N/A

Key Findings: PRHM fees are lower than most private marinas operating in Norfolk County and municipal comparators. There are few comparable marinas that meet PRHM criteria, and limited opportunities to increase fees given the marinas limited service offerings and capacity.

Recommendations: A review of current user fees and an assessment of the impact of recent increases will be analyzed prior to 2026 Budget deliberations, with any potential adjustment to fees recommended for Council's consideration at budget time.

5. Preliminary Sustainability Opportunities

5.1 Port Dover Harbour Marina

5.1.1 Current State

PDHM is a large, 458 slip marina with fuel and pump-out services and capacity for large watercraft dockage. The marina offers services including fuel, pump-out, hydro, and winter storage options, washroom/shower facilities, a pavilion area, BBQ stations, and an administrative building. PDHM's strong historical performance demonstrates the marina's inherent value proposition, with previous seasons achieving 95-100% occupancy, annual waiting lists, and generation of consistent annual surpluses of \$420,000-\$478,000 between 2021-2024. Current slip availability creates capacity to capture the transient boater market and promote regional tourism. This opportunity aligns with successful models employed by comparable municipal marinas:

- **Cobourg Marina** has 220 slips, half are seasonal and half are transient dockage to support their camp ground area;
- **Kingston** offers 60% of slips at both of their marina as transient:
 - **Confederation Basin** offers 400 slips, 250 of which are transient;
 - **Portsmouth Olympic Harbour** offers 190 of its 300 slips to transient boaters.
- **Port Colbourne** typically rents 400 to 450 of its 700 slips to seasonal boaters, offering the remainder as transient.

5.1.2 SWOT Analysis

STRENGTHS

- **Full-Service Marina Facilities:** Fuel, pump out, hydro, launch ramp, washrooms/showers, pavilion, BBQ areas, winter storage, administrative building.
- **Financial:** Slip holders generate annual marina revenue surplus.
- **Existing partnerships:** Coast guard, sailing school, Giles Marine repair shop.
- **Economic driver:** Tourism creates positive economic impact in the community from seasonal slip renters and transient boaters.
- **Physical assets:** Access to deeper water in Lake Erie, can accommodate larger boats, and the ability to accommodate larger sail boats in Norfolk County. Floating docks adapt to water level fluctuations. The gas dock is strategically located in the region and generates a good volume of sales (200-235,000 liters annually).

WEAKNESSES

- **Location:** Outside the downtown core with limited access through a residential area and no direct pedestrian or bicycle access to downtown; steep hill to climb through residential area to access downtown. Opportunities to improve access (e.g. by building a bridge) are limited due to capital costs and suggested property is not owned by the County.
- **Limited facilities:** There are no existing county-owned facilities on site available to lease to private businesses.
- **Limited resources:** Due to limited staffing and financial resources, the County is not in a position to expand event programming or rental/retail operations on its own – these initiatives would require private sector investment. Similarly, the County has introduced user fee increases with no amenity upgrades (e.g. aging assets, small marina office space; limited staff hours to serve patrons and operate fuel docks).
- **Limited new revenue potential:** The County has previously hosted special events and permitted food trucks at the marina, however, these activities have not significantly contributed to marina revenues. Similarly, while there is space available to expand winter storage capacity, staff note that current demand is limited, with no customers turned away.
- **Water levels:** PDHM can accommodate larger boats than many other private marinas operating in the County, but it is not a deep-water harbour. Keel depth capacity is currently limited to 5 to 6 feet to minimize expensive dredging.

OPPORTUNITIES

- **Partnerships:** Potential partnerships with local businesses and existing groups – e.g. Port Dover Waterfront Preservation Association, Port Dover Board of Trade) to improve community access, upgrade the facility, and explore revenue generation opportunities.
- **Land Lease:** Space is available on the property available to accommodate business expansion and mixed use development. Private investment/leasing opportunities exist for watercraft rentals, retail, restaurant/food services, and events. These ventures could generate additional revenue through land rental while increasing marina patronage and tourism.
- **Development:** Subject to planning and conservation authority review and approval, mixed-use/residential development may be possible on the property that would provide a long-term source of revenue.
- **Tourism:** Opportunity to increase tourism, and leverage existing community events (e.g., Friday the 13th). Unsold seasonal slips can be repurposed as transient slips for tourists. Coast Guard could accommodate US tourists as a boarder check point.
- **Advertising:** The County has not advertised to promote the marina, as seasonal slips have typically sold out and/or had a waiting list until the 2025 season. There is an opportunity to increase patronage through targeted advertising, particularly in more expensive markets in the GTA and larger boat harbours. There is also an opportunity to integrate PDHM with existing tourism events/campaigns in partnership with our Economic Development division, and to advertise available winter storage capacity. The County could also promote Port Dover as a boating destination to Canadian and US tourists – strategically located within hours of major boating harbours (e.g., Port Colborne, Erie, Buffalo, etc). Staff began placing targeted ads and digital marketing to promote available slips and transient dockage in Q2 2025.
- **Sponsorship:** Potential to sell naming rights, sponsorship, and vendor contracts.

THREATS

- **Financial:** Current revenue is not sufficient to cover the capital investment needed. Fee increases to cover basic capital costs without significant service improvements have contributed to decreased slip rentals.
- **Demand:** There is room to expand winter storage, however, there is limited demand for it. Similarly, economic downturn has reduced seasonal slip rentals.
- **Downtown Impact:** Expanding business opportunities on site could detract from businesses in the downtown core.
- **Competition:** There are 13 privately owned marinas operating in Norfolk County and other large, deeper water marinas operating on Lake Erie with lower price points.
- **Security:** Challenge to make the marina more open to the public and still ensure security for slip renters.
- **Environmental:** Dredging may be required depending on water levels.

5.1.3 Objectives

FINANCIAL SUSTAINABILITY

- Achieve complete financial self-sufficiency, eliminating reliance on tax levy support for both capital and operating costs.
- Generate annual surplus to be fully reinvested in marina operations and infrastructure
- Develop diverse revenue streams beyond slip rental fees

GOVERNANCE MODEL

- Provide a foundation for potential transition to an MDC, pending completion of feasibility study (expected December 2025).
- An MDC would establish a governance framework that supports:
 - Board of Directors with Council representation and expertise from multiple sectors of Norfolk's economy
 - Stakeholder engagement through an advisory subcommittee that would advise the MDC Board of Directors
 - Planning and operational independence from municipal constraints
 - Business-focused decision-making free of municipal process
 - Flexibility to develop public-private partnerships for service and infrastructure expansion.

5.1.4 Market Position

- **Primary Market:** Owners of larger speedboats and sailboats; vessels requiring deeper-water Lake Erie access
- **Secondary Markets:**
 - Seasonal boaters seeking full-service amenities
 - Transient boaters navigating Lake Erie

- Winter storage customers
- Tourism operators (potential partners for watercraft rentals, tours)
- **Key Differentiator:** Ability to accommodate larger boats on Lake Erie; few marinas in Norfolk County are capable of accommodating large sailboats
- **Pricing Strategy:** At or above area private sector marinas for comparable slips; pricing reflects municipal cost-recovery requirements.
- **Competitive Position:** Serving a specialty market segment not addressed by private marinas

5.1.5 Strategic Direction

COMPETITIVE ADVANTAGE

Among Norfolk County marinas, Port Dover Harbour Marina holds a distinct position due to its capacity to accommodate larger sailboats, which many area marinas cannot offer due to shallower harbours. This capability presents a significant opportunity for targeted market development. Owners of larger sailboats represent a specific market segment that can be served by PDHM without creating competitive pressure on smaller, privately owned marinas in the area. By strategically positioning PDHM to serve this specific segment, Norfolk County could achieve the dual objectives of financial sustainability and continued public waterfront access while adhering to the principle of limiting competition with private enterprises, thereby playing a complementary role in the local marina ecosystem.

Pending the results of the consultants' report, Economic Development staff strongly recommend that any future sustainability planning for PDHM specifically consider and incorporate marketing strategies targeted at owners of larger sailboats. Developing this underserved market segment represents a path to financial sustainability that respects the role of private marina operators by focusing on a more distinct customer base. Staff recommend revisiting this matter after the 2025 season when the MDC feasibility study is complete and 2025 marina operations have been reviewed critical information sources are available, at which time a thorough sustainability plan can be developed with confidence.

GOVERNANCE MODEL

Staff strongly recommend that future sustainability planning for PDHM focus on establishing an MDC as the primary mechanism to achieve financial sustainability. While PDHM has demonstrated commercial viability through consistent annual surpluses, maximizing revenue potential requires expanded amenities and services that can only be achieved through private investment partnerships. The County lacks the financial capacity and operational flexibility to directly develop revenue-generating amenities such as retail establishments, restaurants, watercraft rentals, or mixed-use residential development. An MDC structure would provide the governance framework necessary to facilitate these public-private partnerships, enabling private capital investment in facility expansions and commercial development that would transform PDHM into a waterfront destination. By leveraging private sector expertise and investment through an MDC, Norfolk County could develop the enhanced service offerings and amenities needed to achieve long-term financial sustainability while maintaining public ownership of this valuable waterfront asset.

5.1.6 Action Plan

IMMEDIATE (2025)

Revenue Enhancement

- 100% reinvestment of marina surpluses into dedicated reserve fund (implemented in 2025)
- Optimize winter storage operations to maximize capacity
- Offer vacant seasonal slips as transient slips
- Implement a protocol for abandoned vessel removal/sale to create space

Tourism and Marketing Development

- Work with Norfolk County Economic Development and Communications to promote PDHM
- Position PDHM as a specialty area marina serving the unique needs of sailboat owners and larger vessels
- Marketing campaign for vacant seasonal slips, transient slips, and winter storage
- Targeted advertising in boating publications and the Greater Toronto and Hamilton Area and U.S. markets

Comprehensive Review

- Collect accurate operational and financial data:
 - Marina user data to inform sustainability strategy and marketing plans;
 - Slip vacancy rates size of slips available;
 - Client base that did not renew seasonal slip rental (local, external, size of boats)
 - Success of marketing programs in increasing seasonal and transient slip rentals
- Review all existing third-party agreements to assess contractual limitations, financial implications, and identify opportunities for renegotiation or improvement
- Review the structure and terms of all current rental agreements (including slip holder agreements) to identify opportunities for standardization, improved terms, or enhanced revenue generation
- Develop inventory and site analysis of marina property to determine feasibility of retail lease opportunities and residential development, including zoning requirements, infrastructure capacity, and regulatory constraints
- Support MDC feasibility study

Security

- Review opportunities to make PDHM more accessible to the public next season
- Introduce gated access at the entrance to each dock in 2026 to ensure boats remain secure

SHORT-TERM (1-5 YEARS – Conceptual)

Governance Structure

- Prepare transition plan for MDC governance if feasibility study results are positive and business case is approved by Council, and begin phased transfer of operations to an MDC
- Create framework for operational independence while maintaining appropriate oversight

Revenue Generation

- Create framework for land lease arrangements to allow private businesses to locate onsite
- Investigate partnership opportunities
- Investigate sponsorship and naming rights opportunities for marina sections
- Advertise opportunities to host mobile food trucks on site during peak periods with daily fee or percentage revenue structure

Property Opportunities

- Explore opportunities to market available space on the marina property to new tenants
- Ensure that any lease includes annual rental increases (i.e. CPI)
- Structure lease to include percentage rent component to capture business upside
- Require new tenants to assume responsibility for building maintenance and improvements
- Consider shorter lease term with renewal options to preserve future development flexibility

Development

- Explore mixed-use development concepts (residential and commercial) to substantially increase revenue
- Investigate potential for public-private partnerships for major infrastructure improvements
- Create prospectus highlighting market opportunity for potential business operators
- Target complementary businesses for land lease opportunities (eg. rentals, retail, restaurant)

Tourism Enhancement

- Develop "Port Dover Boating Destination" materials, including videos and sizzlers, testimonials, highlighting strategic location within hours of major harbors and "what's off the water" activities in the community
- Explore partnerships with other marinas to create Lake Erie cruising itineraries
- Create weekend boating packages targeting nearby metropolitan areas
- Explore cross-promotional partnerships with local businesses (e.g. area accommodations, and restaurants, other Norfolk County communities)
- Explore the feasibility of creating designated areas for temporary vendors with percentage-based fee arrangements (e.g. rotating weekly pop-up vendors such as antique market, farm market, fishing, outdoors, food)

LONG-TERM (5+ YEARS – Conceptual)

Development Potential

- Include Port Dover in a Waterfront Master Plan
- Develop comprehensive waterfront experience and enhanced public access
- Explore potential for dedicated water taxi or shuttle service to connect marina with downtown
- Explore the creation of walking/cycling path to improve connectivity with downtown (subject to property constraints)
- Explore creation of premier boating destination with enhanced amenities funded through private investment

Financial Sustainability

- Implement long-term financial model with sustainable fee structure
- Develop framework for capital reserve funding to address major infrastructure requirements

5.2 Port Rowan Harbour Marina

5.2.1 Current State

PRHM is a small marina attached to a large public waterfront park with a public pier, 40 private seasonal small watercraft slips, and 38 boat houses that are privately owned on waterlots leased annually from the County. Available seasonal dockage is typically 100% utilized. As of May 2025, two seasonal slips are available, and no boat houses are for sale. There is typically no turnover for Port Rowan boathouses; they are often passed down generationally. PRHM currently operates at an annual deficit, and the Harbour requires dredging in 2025 that will cost an estimated \$400,000.

PRHM has consistently been identified as unprofitable/unviable as a business operation. The marina itself offers limited opportunities for expansion and is a “passive” operation, with no staff or on-site amenities. Additional staffing, expansion into non-motorized watercraft rentals, and facility enhancements would require a level of investment that the County is unable to support. However, Port Rowan’s Long Point Park and the marina pier are actively used by the public, and the area is considered a vital part of Port Rowan’s community identity. The asset could be marketed as a community focal point and further developed as a tourism destination.

Finally, because the marina operates passively with limited amenities, its fees are lower than privately owned marinas in the area and launch ramp fee collection is not regulated. These are ongoing points of contention among private marina owners in our community.

5.2.2 SWOT Analysis

STRENGTHS

- **Existing infrastructure:** Pier, docks, slips, boathouses, and adjacent Long Point Park, are already on site and have historic significance to the community. There is also a privately owned restaurant adjacent to the marina.
- **Proximity to downtown:** The marina asset and park are easy to access from the central business area and Lake Erie tourism routes.
- **Waterfront:** Waterfront park setting in a friendly small town with publicly accessible pier and fishing.
- **Heritage:** The site has interesting local history that is being researched by local historians. A historic Becker Puller fishing artifact invented by a local resident will be located in the adjacent park in a new glass pavilion in 2026.
- **Unique Pier and Harbour:** The Port Rowan boat houses offer unique charm, and the pier is publicly accessible.

WEAKNESSES

- **Water depth:** Low water levels at the harbour entrance and channel limits boat size and can prevent ramp usage, and requires dredging.
- **Passive marina:** There are no staff present on site to collect ramp and transient dockage fees, which can lead to lost revenue. Increasing staff levels is cost prohibitive and does not

demonstrate a sufficient return on investment to justify the expenditure. Similarly, investing in automated gates/payment methods could increase revenue, but may not offset the cost of the investing in and maintaining the infrastructure. Passive operation and limited amenities also limit the amount the County can charge for seasonal slips.

- **Limited revenue generation opportunities:** Small marina next to a large park, limited room for expansion, no room for storage, no existing facility to accommodate rental business. Similarly, transitioning slips to transient to promote tourism would limit guaranteed revenue streams.
- **Limited amenities:** Limited hydro capacity and water, limited boat trailer parking, minimal security.

OPPORTUNITIES

- **Site Development:** May be possible to sell additional boat house lots on the pier and/or add new slips/increase transient dockage to promote tourism. Private enterprises could apply/propose starting rental businesses for small watercrafts/non-motorized crafts.
- **Tourism:** Could promote economic development and tourism through advertising and partnerships and increase access to downtown with wayfinding, and encourage more special events. Initiatives that draw tourists to the waterfront could create opportunities for private water-oriented businesses, such as fishing charters and small water craft rentals.
- **Film Location:** Norfolk's Economic Development team are developing a "Film in Norfolk" initiative. PDHM would be an ideal location to market as a filming site.
- **Partnerships:** Potential to partner with local organizations (e.g. Port Rowan Harbour Committee, Port Rowan-South Walsingham Heritage Association, Longpoint Lions, and/or Longpoint Chamber of Commerce) to improve the asset and promote the area as a local heritage destination.
- **Revenue:** May be possible to generate additional revenue through expansion and/or private investment, paid parking, and/or security camera or automated boat launch gate payment.

THREATS

- **Low water levels:** Water depth issues are prominent due to the marina's geography. Low water prevents usage, promotes weed growth, requires expensive dredging depending on water depth.
- **Deferred maintenance:** Deteriorating boathouses; pier inspection required.
- **Private marinas:** A passive marina with limited amenities and infrastructure requires lower charges, and thus takes business away from private marinas in the area.
- **Viability:** PRHM is not a financially viable operation, and the property cannot generate enough revenue to sustain itself.

5.2.3 Objectives

VALUE PROPOSITION

- Recognize PRHM's unique public value and primary function as a community amenity rather than a traditional marina, serving a broader public purpose that warrants evaluation through a public value lens.

- Maintain public access to this distinctive waterfront resource and gathering space.
- Maximize the facility's potential as a community focal point, tourism destination, film location, and catalyst for local economic development opportunities.

GOVERNANCE MODEL

- Implement an appropriate governance and operational structure that aligns with PRHM's primary function and community value while supporting long-term viability.
- Evaluate and select the most suitable operational pathway (MDC inclusion or Parks department reclassification) based on the forthcoming MDC feasibility study recommendations and Council approval.

5.2.4 Market Position

- **Primary Market:** Small watercraft owners and boathouse leaseholders
- **Secondary Markets:**
 - Community members seeking waterfront access and recreation
 - Tourists visiting Port Rowan and Long Point area
 - Film/photography production companies
 - Event organizers and pop-up vendors
- **Key Differentiator:** Community waterfront park with boating component rather than commercial marina
- **Pricing Strategy:** Market-appropriate fees for waterlot leases and slips that reflect limited amenities
- **Competitive Position:** Community asset providing public waterfront access rather than competing with commercial marinas

5.2.5 Strategic Direction

COMMUNITY AND ECONOMIC DEVELOPMENT ASSET

Previous reports, public feedback, and financial analysis demonstrate that Port Rowan Harbour Marina functions primarily as a community amenity providing public waterfront access in a historic setting. Unlike typical marinas, PRHM serves a unique customer base and purpose, and represents a distinct case within Norfolk County's marina portfolio, one that warrants consideration through a broader public value lens. Unlike facilities that serve primarily boating interests, this public harbour functions as a significant public gathering space that delivers multiple community benefits beyond traditional marina operations. Therefore, PRHM should be considered a public waterfront park; a community focal point with unique historic charm that draws tourists to the community and creates opportunities for entrepreneurs to develop new businesses in the area (i.e. as a community asset, tourism asset, and economic development asset).

The strategic location of PRHM, with its convenient proximity to the downtown area, positions it as an ideal venue for community activation and public enjoyment. This location creates a natural synergy between the waterfront and the business district, allowing each to support and enhance the other. Residents and visitors drawn to waterfront activities naturally flow into downtown businesses,

while downtown patrons benefit from access to the scenic and recreational opportunities of the harbour. Through interdepartmental collaboration between Parks, Heritage and Culture, Planning, and Economic Development, this space could be enhanced as a vibrant community hub. Such collaboration would enable a holistic approach to programming and development that maximizes public benefit while enhancing revenue potential. This space offers numerous opportunities for activation beyond traditional marina uses, including:

- Community events and festivals
- Seasonal markets and artisan fairs
- Film and photography production locations
- Educational programming about local history and maritime heritage
- Pop-up dining and entertainment venues
- Public art installations and cultural exhibitions

These activation strategies would enhance public enjoyment of this community asset and could generate additional revenues that contribute to its financial sustainability. Furthermore, they would create economic spillover effects for downtown businesses, supporting broader economic development goals.

While financial sustainability remains an important consideration, it must be balanced with recognition of the significant public good this asset provides as an accessible waterfront space for all residents. Unlike more remote and/or specialized marina facilities, PRHM offers universal enjoyment of the waterfront regardless of boat ownership – a value that extends beyond direct revenue generation. By reimagining PRHM as a multifunctional community asset rather than solely as a marina facility, Norfolk County can preserve this valuable public space while enhancing its sustainability through diversified revenue streams and interdepartmental collaboration.

GOVERNANCE OPTIONS

Staff have identified two potential paths forward for PRHM operation and governance. First, inclusion under the MDC could provide access to alternative revenue streams and partnership opportunities that are not currently available under the existing operational structure. This approach would leverage the MDC's mandate and capabilities to explore commercial partnerships, grant funding, and other income-generating activities that could help support the marina's long-term viability. However, it is important to recognize that PRHM will remain fundamentally a community asset with inherently limited revenue-generating potential. Second, reclassification of PRHM as a waterfront park under Norfolk County's Parks department would align the asset's operational framework with its primary function and community value. The optimal approach will be determined by the recommendations of the forthcoming MDC feasibility study and subsequent Council approval. Both pathways share the common objective of maintaining public access to this distinctive waterfront resource while optimizing its role as a tourism destination and community asset.

5.2.6 Action Plan

SHORT-TERM (2025)

- Dredging in 2025 (approved in 2025 budget)

- Assess the feasibility of including PRHM in the MDC structure, or putting PRHM under Norfolk County's parks department
- Review current fee and waterlot lease structure against market rates with emphasis on:
 - Appropriate pricing and terms for boat house water lot leases
 - Launch ramp fees that balance public accessibility with revenue generation
 - Seasonal slip rates that reflect limited amenities
- Maintain revenue generation through slip and boat house waterlot rentals
- Market PRHM and Long Point Park as a focal point in the community to improve tourism and create economic development opportunities
- Integrate Port Rowan Public Harbour into new Film in Norfolk marketing strategy
- Install a security camera at the launch ramp to encourage increased fee payments, and investigate offering a QR code for digital payments
- Review launch ramp and consider opportunities for automated gate and digital payment for fee collection

MEDIUM-TERM (1-5 YEARS – Conceptual)

- Commission pier inspection to assess repair needs and assess the feasibility of offering additional waterlots and/or seasonal/transient slips along the pier to increase revenue, particularly on the west side of the pier (for consideration in 2026 Capital Budget)
- Implement automated gate with digital payment option for improved ramp fee collection
- Consider integrating paid parking to increase revenue
- Implement longer-term waterlot leases for boathouses (i.e. from 1 year to 5-10 years or 15-20 years) to encourage property improvements
- Develop minimum standards/building codes for boathouses to preserve character and ensure property standards and appropriate maintenance:
 - Integrate these standards as part of waterlot lease agreements
 - Revise boat house pricing structure based on:
 - Square footage of water covered
 - Higher charges for units with living accommodations
 - Limit continuous occupancy to two weeks (otherwise consider as second home for property tax purposes)
- Work with Economic Development and/or MDC to explore opportunities to:
 - Integrate PRHM into upcoming tourism and economic development initiatives and waterfront development strategies
 - Integrate PRHM into existing waterfront recreation trails
 - Partner with local businesses and Chamber to increase area tourism
 - Implement property leasing program for compatible rental businesses
 - Explore opportunities to partner with Port Rowan Harbour Committee and Port Rowan-South Walsingham Heritage Association to identify opportunities to highlight the site's historical significance
 - Develop comprehensive promotion strategy positioning Port Rowan as a heritage waterfront destination
- Advertise formal application process for special events and temporary vendor permits
- Develop phased approach for upgrading basic amenities, including:
 - Improved public washroom facilities
 - Enhanced picnic and passive recreation areas

- Better wayfinding and connection to downtown
- Investigate potential for grant funding for improvements

LONG-TERM (5+ YEARS – Conceptual)

- Include Port Rowan in a Waterfront Master Plan that includes:
 - Marina operations as a component of broader recreational experience
 - Integration with regional tourism initiatives
 - Promotion of historical/heritage features elements
 - Enhanced public access and amenities
- Evaluate opportunities for water transportation linking Port Rowan to other Lake Erie destinations (e.g. land shuttle service, Ride Norfolk on demand, Eco tourism to Long Point)

5.3 2025 Implementation Timeline

Q1 2025: CONSULTATION

- Public consultation developed and conducted
- Staff analysis of public feedback
- RFP for MDC consultant drafted and released
- MDC consultant retained

Q2 2025: IMPLEMENTATION

- MDC project kickoff
- Update report and action plan drafted and presented to Council
- Initiated PRHM dredging permit application process for submission to the Ministry of Natural Resources
- Derelict/abandoned boat removal/resolution process initiated. 7 of 20 boats have been removed; remaining 13 are in progress but will require legal process and/or removal costs to resolve
- Marketing plan developed and launched for vacant PDHM slips and winter storage opportunities

Q3 2025: ACTIVATION

- **Tourism and Marketing:** Advertise slip and winter storage availability. Work with Economic Development staff to promote the marinas and integrate them into existing initiatives (e.g. Film in Norfolk).
- **Inventory:** Both marinas will be inventoried to assess available space for future opportunities (e.g. business rental space, expanded winter storage, future development, film locations) and identify requirements for development. Inventory to include photo and video as image collateral for potential film/advertising opportunities.

- **Data:** Available data will be reviewed and analyzed. Additional data such as user information, demographics, location quotient, vacancy reasons, trends, residents, versus non, postal code data will be collected and reviewed to determine target markets.
- **Agreements:** Staff and legal review of all existing agreements to identify opportunities for revenue generation, growth, and improvement (e.g. slip and boathouse agreements; derelict boats, Giles Marine agreement, sailing school, coast guard agreements)
- **Security:** Implement a security camera pilot program in Port Rowan and investigate QR code for digital payments to help increase daily rampage fee payments

Q4 2025: RESOLUTION

- Analysis of Q3 findings
- Port Rowan dredging pending MNR permit approval
- All delict boats will be removed or resolved by 30 November
- MDC Consultant Report presented to Council for consideration in December, with Q3 findings integrated into the covering report.

6. Conclusion

This report serves to update Council on initial findings and public engagement outcomes. Formal recommendations regarding marina sustainability will follow the completion of the consultant's study and review of 2025 operational data, both of which are essential to shaping an effective long-term strategy. In the interim, staff have presented preliminary findings for marina sustainability and have identified a path forward for 2025.

Port Dover Harbour Marina has strong potential for enhanced financial sustainability. However, the marina has substantial capital requirements that cannot be met through traditional municipal funding models or user fee increases alone. The municipality does not have the capacity to fund facility expansions or create new businesses directly. These enhancements must be achieved through private investment, revenue-sharing partnerships, and potential development. Preliminary staff analysis indicates that a Municipal Development Corporation structure offers the ideal governance framework to facilitate these partnerships while achieving long-term financial sustainability. An MDC would provide the operational independence, business-focused decision-making, and flexibility required to pursue innovative revenue generation opportunities and respond to market conditions effectively. By transferring marina operations to an MDC (pending the completion of the feasibility study in December 2025 and Council approval), Norfolk County could maintain public ownership of this valuable waterfront asset while enabling private capital investment, diversification of revenue streams, optimization of operational efficiency, and could ultimately transform Port Dover Harbour Marina into a self-sustaining waterfront destination that continues to benefit both boaters and the broader community. The objectives outlined for 2025 will help provide the foundation for this governance and operating model.

Port Rowan Harbour Marina serves a fundamentally different purpose than Port Dover Harbour Marina, functioning primarily as a community waterfront park with a small boating component rather than a commercial marina operation. By implementing reasonable revenue-generating measures and focusing on PRHM's heritage value and tourism potential, the County can preserve this important community asset. This approach balances modest revenue enhancement through improved fee collection and lease management with recognition of the site's broader community, historical, and tourism value. However, PRHM will continue to require municipal support, and major infrastructure investments (e.g. dredging, pier improvements, automated gate) will not produce a return on investment due to limited revenue generation opportunities on the site. Inclusion under the MDC may help mitigate this through exploration of other revenue generation options and/or partnership opportunities. Alternatively, PRHM could be reclassified under Norfolk County's Parks department as a waterfront park to better reflect the asset's true function and value, pending the recommendations of the forthcoming MDC feasibility study and Council approval. Either option would seek to preserve public access to this unique waterfront asset while maximizing its potential as a tourism and community focal point.

From an economic development perspective, establishing an MDC and actively pursuing private investment emerges as the optimal strategy for unlocking the full potential of Norfolk County's marinas. The preliminary sustainability analysis clearly indicates that the existing municipal operational model lacks the necessary flexibility and financial capacity to adequately support the long-term capital investment and operational improvements needed for sustainable marina operations. The MDC model, complemented by targeted private-sector partnerships, provides an essential mechanism for enhancing the economic viability of these valuable waterfront assets. It enables Norfolk County to maintain public ownership and oversight, ensuring that community heritage, cultural integrity, and public waterfront access are preserved and celebrated. At the same time, it introduces private capital and innovative business practices critical to revenue generation, infrastructure renewal, and improved facility offerings. Specifically, the MDC structure would facilitate commercial development opportunities at PDHM, such as retail, dining, recreational rentals, and potential mixed-use residential development, driving increased revenue and economic activity. At PRHM, the MDC could foster initiatives that emphasize the marina's cultural and historical value, transforming it into a vibrant community and tourism asset that attracts visitors and benefits local businesses. Adopting an MDC-supported public-private partnership approach could optimize the marinas' commercial potential and substantially enhance the overall quality of life within Norfolk County. This strategy could effectively activate waterfront lands, generate sustainable revenue streams, and reinforce the marinas' integral role in the broader economic fabric of the region, paving the way for prosperous and community-focused development.