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NEW YORK'S GREAT LAKES MARINAS: A 1990 ANALYSIS AND PROFILE

by

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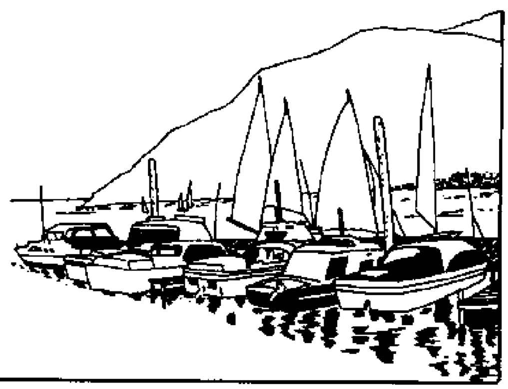

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INTRODUCTION

As questions regarding the environmental impact, pumpout requirements and future expansion of marinas continue, the need for up-to-date data on the present status of the marina industry along New York's Great Lakes is critical. The last major characterization survey of Great Lakes marinas was conducted in 1972, and reported in *The New York Commercial Marina and Boatyard Industry, 1972* (Noden and Brown, 1975). Since that time, there have been several inventories conducted, but none addressed questions on use, management and impacts of marinas along the state's Great Lakes shore. In an effort to fill this information need, the New York Sea Grant Extension Program conducted a questionnaire survey of marinas along New York's Great Lakes (Lake Erie, the Niagara River, Lake Ontario and the St. Lawrence River) during the fall of 1990.

The survey questionnaire (Appendix 1) was, where possible, based on the 1972 survey to allow for a comparative analysis over the past 18 years. Surveys were mailed to 210 marinas, and one reminder was mailed two weeks later to encourage participation. Ten (10) questionnaires were returned from marinas which had gone out of business. Eighty-three (83) completed questionnaires were returned, resulting in a response rate of 41.5%. This report will focus on the responses received and, where possible, will compare them to the results from the 1972 survey.

Although this survey questionnaire addressed over 100 response variables, this report presents only a limited analysis of the responses received. A more comprehensive analysis for use in planning for or reviewing marina-related issues may be conducted by the author upon request. The data presented in all tables in this report shows the number of responses received in each category; percentages in the 1990 NY Great Lakes Total and 1972 NY Great Lakes Total categories are provided to facilitate comparison.

GENERAL BUSINESS DESCRIPTION

The first set of questions in the survey was directed at the general nature of the marina business (business organization, management, etc.). Table 1 provides an overview of the responses received by body of water and Great Lakes wide; where appropriate, data from the 1972 survey is presented. (*Note:* the 1972 survey was conducted statewide and only 35 responses were received from marinas along the Great Lakes.)

A comparison of the data across the 18-year period of study shows that the percentage of businesses organized as corporations remained the same (54%), while the percentages of those organized as individual proprietorships dropped by nearly half (22%). This has occurred while marina management has remained relatively unchanged. Also of significance is the fact that the number of years in business has remained

Table 1. General business description.

	Lake Erie	Niagara River	Lake Ontario	St. Lawrence River	1990 NY Great Lakes Total		1972 NY Great Lakes Total*	
	No.	No.	No.	No.	No.	%	No.	%
NUMBER OF MARINAS	9	7	47	19	82	(100%)	35	(100%)
BUSINESS CLASSIFICATION								
Marina	7	7	40	18	72	(89)	31	(89)
Boatyard	0	0	1	1	2	(3)	3	(9)
Other	2	0	5	0	7	(8)	1	(3)
BUSINESS ORGANIZATION								
Individual proprietorship	1	0	11	5	17	(22)	15	(43)
Partnership	1	0	2	3	6	(7)	1	(3)
Corporation	4	5	28	8	45	(55)	19	(54)
Yacht club	2	0	4	1	7	(8)	—	—
Governmental	1	2	2	2	7	(8)	—	—
MANAGEMENT								
Owner	5	4	34	14	57	(69)	25	(71)
Manager	3	3	8	3	17	(20)	7	(20)
Both	1	0	5	2	8	(11)	3	(9)
SOLE INCOME								
Owner	2	2	17	8	30	(37)	—	—
Manager	3	3	18	10	33	(45)	—	—
Number of years in business (average)	38	40	24	31	28		30	
Number of acres (average)	56	151	17	151	53		4.1	
Linear waterfront (average in feet)	639	1,587	785	1,583	1,034		774	
Underwater leases	0	1	4	2	7	(8)	—	—
costs per year (average)	0	—	$625	$8,075	$4,820		—	—

**Source:* Noden, Dick and Tommy Brown. September 1975. *The New York Commercial Marina and Boatyard Industry, 1972.*

relatively unchanged during the 18-year period. Land ownership, however, has changed dramatically, with the average number of acres going from 4.1 to 53.0, and linear waterfront frontage from 774 to 1,034 feet.

DOCKAGE/STORAGE CAPACITY

The second set of survey questions sought information on 1990 summer and winter dockage and storage capacity. Table 2A provides an overview of the 1990 responses received along with berthing and winter storage capacities from the 1972 survey for comparison. The numbers presented in the table are total berthing capacities reported by the respondents, and when these are averaged we find that the number of moorings per marina went from approximately 20 in 1972 to 14 in 1990, and that the average number of slips increased from 85 to 102. In comparing the winter storage capacities, dry-uncovered went from 105 to 102, dry-covered from 75 to 57, and wet from 5 to 2.

In an effort to provide an assessment of the 1990 berthing and storage rates reported, Table 2B presents averages of rates set by the season, foot, square foot or cubic foot.

Table 2A. Dockage/storage capacity.

	Lake Erie	Niagara River	Lake Ontario	St. Lawrence River	1990 NY Great Lakes Total		1972 NY Great Lakes Total*	
Berthing capacity (totals)								
moorings	28	238	269	97	632	[46]	61	[3]
slips	1,690	962	3,769	1,243	7,664	[75]	2,873	[34]
dry-stack	0	80	0	127	207	[18]	—	—
% reserved in advance	98%	97%	84%	82%	86%		—	—
Waiting list (no. of firms)	8	4	35	13	60	(73%)	—	—
average no. on list	150	77	50	12	56			
Transient slips (totals)	16	33	401	205	655	[62]	—	—
Parking capacity (average)	242	294	144	197	181		—	—
No. firms reaching capacity	7	5	18	12	42	(51%)	—	—
Winter storage (totals)								
dry-uncovered	758	885	2,589	1,268	5,500	[54]	2,314	[22]
dry-covered	339	245	949	1,470	3,003	[53]	1,503	[20]
dry-stack	0	326	0	300	626	[19]	—	—
wet	0	4	42	0	46	[22]	10	[2]
(numbers in [ ] represent number of firms reporting)								

**Source:* Noden, Dick and Tommy Brown. September 1975. *The New York Commercial Marina and Boatyard Industry, 1972.*

Table 2B. Dockage and storage rates.

<u>1990 Summer Berthing Rates (averages)</u>:

Moorings: $412.00/season [5]; $11.70/foot [2]

Slips: $785.00/season [21]; $32.79/foot [38]; $.10/cubic foot [1]

Dry-stack: $600.00/season [1]; $2.20/square foot [2]

<u>1990 Winter Storage Rates (averages)</u>:

Dry-uncovered: $95.00/season [3]; $15.22/foot [22]; $1.98/square foot [7]

Dry-covered: $150.00/season [1]; $16.08/foot [13]; $2.61/square foot [12]

Dry-stack: $600.00/season [1]; $2.30 square foot [5]

Wet: $13.33/foot [3]

<u>1990 Transient Slip Rates (averages)</u>:

$11.76/day [25]; $.59/foot [21]

(numbers in [ ] represent number of firms reporting)

MARINA SERVICES

Table 3 presents an overview of the services Great Lakes marinas presently offer. Of the 13 service categories with percentages that can be compared between 1990 and 1972, 11, or 85%, have shown a decrease. Only "ice" and "showers" have become more widely available. Also during this time frame, several studies have documented a significant increase in fishing activity on all four bodies of water. Thus, it is interesting to note that the percentage of facilities providing launch ramps has remained approximately the same, as has the percentage of marinas providing pumpouts.

Table 3. Services provided.

	Lake Erie	Niagara River	Lake Ontario	St. Lawrence River	1990 NY Great Lakes Total		1972 NY Great Lakes Total*	
	No.	No.	No.	No.	No.	%	No.	%
Service Provided								
Gasoline	5	4	32	13	54	(66%)	34	(97%)
Fresh water (dockside)	6	6	22	13	47	(57)	24	(75)
Electricity (dockside)	7	7	29	10	53	(65)	29	(83)
Electricity (metered)	1	0	3	2	6	(8)	—	—
Ice	7	4	35	14	60	(73)	21	(64)
Restrooms	9	7	41	15	72	(88)	31	(94)
Marine supplies	7	5	31	13	56	(68)	31	(94)
Showers	5	3	32	9	49	(60)	7	(22)
Boat, trailer, motor sales	6	2	16	10	34	(42)	25	(71)
Haul out	7	5	30	13	55	(67)	—	—
Fiberglass repair	6	5	21	8	40	(49)	25	(71)
Wood repair	3	4	14	5	26	(32)	24	(69)
Inboard repair	7	4	26	8	45	(55)	28	(80)
Outboard repair	6	4	19	6	35	(43)	24	(69)
Fish cleaning station	1	0	19	5	25	(31)	—	—
Boat/motor rentals	1	0	11	9	21	(26)	16	(46)
Launch Ramp Available	5	1	28	10	44	(54)	18	(51)
Average cost per launch	$.75	$4.62	$1.37	—	$3.41		—	—
Average cost per season	$37.50	—	$48.39	—	$30.10		—	—
Average number launches per season	1,828	—	893	81	709		—	—
Pumpout Available	4	4	17	6	31	(39)	13	(37)
Number of times used	63	100	74	100	83		—	—
Cost per use	$3.80	$3.92	$4.04	$2.27	$3.51		—	—

**Source:* Noden, Dick and Tommy Brown. September 1975. *The New York Commercial Marina and Boatyard Industry, 1972.*

Table 4. Management considerations.

	Lake Erie	Niagara River	Lake Ontario	St. Lawrence River	1990 NY Great Lakes Total		1972 NY Great Lakes Total	
	No.	No.	No.	No.	No.	%	No.	%
Accepts reservations for transient boaters	4	3	29	11	47	(60%)	16	(46%)
Accepts reservations for specific berths	2	2	22	5	31	(40)	—	—
24 hour security provided	5	2	15	7	29	(36)	—	—
Sewage hookup								
city sewer	4	4	8	5	21	(27)	11	(31)
septic tank	4	1	26	6	37	(51)	19	(54)
holding tank	1	1	7	0	9	(12)	—	—
Drinking water								
city	8	7	25	6	46	(58)	21	(60)
own well	0	0	14	7	21	(26)	8	(22)
lake water (chlorinated)	1	0	4	5	10	(13)	3	(9)
Zoning in effect	8	4	39	14	65	(79)	—	—
Distance to public marina(miles)	11	5	9	4	8	—	—	—
Public marina impact to operation								
helped	3	0	6	3	12	(20)	3	(11)
hindered	2	4	5	3	14	(23)	9	(33)
no effect	1	1	21	8	31	(52)	15	(56)
Employees (total no.)								
full time	21	37	86	46	190		—	—
part time	11	4	10	9	34		—	—
temporary	78	25	188	64	355		—	—
Annual gross salaries	$39,350	$21,800	$68,273	$23,952	$64,316	—	—	—
Separate commercial business rate	2	0	7	0	9	(11)	—	—
Member of an MTA	3	3	19	7	32	(40)	—	—

**Source:* Noden, Dick and Tommy Brown. September 1975. *The New York Commercial Marina and Boatyard Industry, 1972.*

MANAGEMENT CONSIDERATIONS

This section of the survey included questions about the management and operation of marina facilities. Table 4 presents an overview of the responses received. One significant management change between 1972 and 1990 is that the number of firms accepting reservations for transient boaters has increased by 14%, suggesting a modification in business practices to accommodate this specific user group. Also, only 40% of the marinas responding belong to a marine trades association (MTA)—a fact that is of concern to many industry leaders. With increasing regulatory and financial pressures being brought to bear on the marina industry, leaders in the marina community hope to address this concern.

An issue that often surfaces when discussing marina management and operation is the perceived conflict between public and private marinas. In the 1972 survey, 67% of the respondents felt that the public marina "helped" or had "no effect" on their operation, while in 1990, 72% (a 5% increase) indicated that publicly owned or run marinas had "helped" or had "no effect" on their operation. To further elaborate on this issue, Appendix 2 presents the comments received in response to the survey questions regarding the advantages and disadvantages of public marinas.

ECONOMIC STATUS OF THE MARINA INDUSTRY

Responses from the survey show a 17% increase in the revenues received from docks and related services between 1972 and 1990 (Table 5). An apparent shift in the gross income of marinas is noted in that there has been an 20% decrease in the percent of marinas grossing less than $100,000; a 12% increase in those firms grossing from $100,000 to $500,000; a 1% increase in those firms grossing between $500,000 and $1,000,000; and a 6% increase in those firms grossing over $1,000,000. While some of this higher gross income may be due to inflation, other factors such as revitalization of the tourism and sportfishing industries on the Great Lakes also support this trend.

Table 5. Economic status of marina industry.

	Lake Erie	Niagara River	Lake Ontario	St. Lawrence River	1990 Great Lakes Total		1972 Great Lakes Total	
	No.	No.	No.	No.	No.	%	No.	%
Gross income								
less than $100,000	2	2	17	5	26	(32)	13	(52)
$100,000–250,000	3	1	13	6	23	(29)	3	(12)
$250,000–500,000	1	1	7	3	12	(15)	5	(20)
$500,000–750,000	0	0	2	2	4	(5)	2	(8)
$750,000–1,000,000	2	0	1	0	3	(4)		
more than $1,000,000	1	3	5	2	11	(14)	2	(8)
Average percent of revenue from docks	41%	45%	50%	30%	—	44%	—	27%
Total expenses	$146,250	$100,000	$173,153	$42,790	$132,521		—	—

CURRENT CONCERNS

The final section of the survey (Part VI) sought information regarding the concerns marina managers/owners see as most pressing. As most facets of the marina industry are regulated by a federal, state or local authority, we first asked what level of interaction marinas had with these agencies during 1989 and 1990. The following list summarizes the percentage of businesses interacting with the various regulatory agencies:

Regulatory Agency Contact

Federal	
Army Corps of Engineers	83%
Coast Guard	86%
Environmental Protection Agency	23%
Occupational Safety/Health Administration	9%
State	
Department of State	33%
Department of Environmental Conservation	85%
Office of General Services	20%
Department of Transportation	15%
Local	
Health Department	50%
Local Government Departments	56%

Of those who have had contact with one or more of the above regulatory agencies, 41% indicated that they have encountered difficulties.

Also in this section of the survey, respondents were asked to identify what they see as the biggest problems/concerns facing their industry. The top five concerns mentioned were: an overregulated industry with inconsistent enforcement of regulations; economic and financial stability of the industry; low water levels; increasing taxes and fees; and rising insurance costs.

SUMMARY

This survey provides a new benchmark from which to gauge the marina industry along New York's Great Lakes. In some specific management and operational areas there have been significant changes and growth, while in others the industry has remained stable or declined. The information presented should assist those who operate or plan to operate marina facilities as well as those who regulate or provide assistance to this industry as it addresses the challenges of the 90s. For further analysis of the results presented, please write to New York Sea Grant, Swetman Hall, SUNY College at Oswego, Oswego NY 13126–3599, or call (315) 341–3042.

ACKNOWLEDGMENTS

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Copies of this publication are available from:

New York Sea Grant
Swetman Hall
SUNY College at Oswego
Oswego NY 13126–3599

GREAT LAKES MARINA SURVEY
October 1990

Part I: General Business Description

1. What body of water is your marina located on? (check one)

   ___ Lake Erie and embayments ___ Niagara River
   ___ Lake Ontario and embayments ___ St. Lawrence River

2. What is the term that would best describe your business?

   ___ Marina (dockage, supplies)
   ___ Boatyard (10-20 slips, mainly repairs)
   ___ Other (specify) ______________

3. How is your business organized?

   ___ Individual Proprietorship ___ Yacht club
   ___ Partnership ___ Governmental/public
   ___ Corporation ___ Dockominium/Cooperative
   ___ Other (please specify) ______________

4. Who provides management of the marina? (check all that apply)

   ___ Owner
   ___ Paid manager
   ___ Other (specify) ______________

5. Does the marina manager derive his/her entire income from this business? ___yes ___no

6. Does the marina owner derive his/her entire income from this business? ___yes ___no

7. What is your normal boating season, i.e.; period from "boats in" to "boats out"?

   __________ to __________

8. How many years has this marina been in business? ________

9. Approximately how many acres of land at this site are owned by your firm? ________

10. What is the linear waterfront footage of your property? ________

11. Do you lease underwater lands from New York State? ___yes ___no

    If yes, what is the annual cost of the lease? $______

Part II: Dockage/Storage Capacity

12. What was your 1990 summer berthing capacity and rates?

	Number	Rate ($)
Moorings	____	______ per (circle one: ft. sq.ft. cu.ft.)
Slips	____	______ per (circle one: ft. sq.ft. cu.ft.)
Dry Stack	____	______ per (circle one: ft. sq.ft. cu.ft.)
Other	____	______ per (circle one: ft. sq.ft. cu.ft.)

13. Of the above, how many slips are reserved for transient boaters? _______

What is the rate per/ft? $_____

14. In 1990, what % of your seasonal berths were reserved in advance for the entire boating season? ____%

15. Do you have a waiting list for seasonal berths? ___yes ___no

If yes, how many are on your waiting list? _____

16. Were there periods of your boating season when all non-seasonal berths (transient) were occupied? ___yes ___no

Generally, when were the periods of maximum use for transient slips?

[ ] holiday weekend [ ] weekday [ ] weekend [ ] other (specify)_________________

17. Approximately how many cars can your parking lot accommodate? _________

18. Was your parking lot full at any time during 1990? ____yes ____no

19. What are your winter boat storage capacity and rates?

	Number	Rates ($)
Dry-uncovered	_____	______ per (circle one: ft. sq.ft. cu.ft.)
Dry-covered	_____	______ per (circle one: ft. sq.ft. cu.ft.)
Dry-stack	_____	______ per (circle one: ft. sq.ft. cu.ft.)
Wet	_____	______ per (circle one: ft. sq.ft. cu.ft.)

Part III: Services

20. Check the services that your marina provides to customers?

___ Gasoline
___ Fresh water (dockside)
___ Electricity (dockside): metered ___ yes ___no
___ Ice
___ Restrooms
___ Marine supplies
___ Showers
___ Boat, trailer, motor sales

___ Haul Out
___ Fiberglass boat repairs
___ Wood boat repairs
___ Inboard engine repairs
___ Outboard engine repairs
___ Fish cleaning station
___ Boat/motor rentals

21. Do you have a launch ramp open to the public? ___yes ___no

How much do you charge? _______$/launch ______$/season

Approximate number of boats launched in 1990? ________
(include only those boats launched that are not moored at the marina)

22. Do you have a pumpout facility? ____yes ____no

If yes, how many times was it utilized in 1990? _____

What do you charge per use? $______/use

Part IV: Management/Operational Considerations:

23. In 1990, did you:
    a) accept reservations for transient boaters? ___yes ___no
    b) permit reservations of specific berths? ___yes ___no
    c) have a maximum length of stay? ___yes ___no

24. Do you provide 24 hour security? ___yes ___no

25. What type of sewage hookup does your marina have?

    ___city sewer ___holding tank

    ___septic tank ___other (specify)___________________

26. What is your source of drinking water?

    ___city ___chlorinated lake water

    ___own well ___other (specify)___________________

27. Are you under zoning regulations? ___yes ___no

    If yes, what type of zoning? ______________________

28. Has zoning prevented you from building new facilities or expanding? ___yes ___no

29. How far is your marina from the nearest publicly owned marina? ________________

    How has this affected your operation?

    ___helped ___no effect

    ___hindered ___other (specify)__________________

30. What advantages does your marina have over the public marina?

    ____

    ____

    ____

31. What advantages does the public marina have over your marina?

    ____

    ____

    ____

32. How many people do you employ to operate your marina?

    Year round, full time ____ Year round, part time ____ Seasonal, temporary ____

33. What is your total annual gross salaries for those included in question #32 (estimate)?

    $__________

34. Do you have a separate dockage rate structure for commercial businesses (ie. charterboats)?

    ___yes ___no

35. Are you a member of a marine trades organization? ___yes ___no

Part V: Economic Status of Marina Industry

36. Please check the category that best represents your gross income for 1990 from the marina and related services.

___less than $100,000
___$100,000 - $250,000
___$250.000 - $500,000
___$500,000 - $750,000
___$750,000 - $1,000,000
___more than $1,000,000

37. Approximately what percentage of your gross revenue is from docks\berths etc? ___%

38. What were your approximate total expenses for 1990 for the marina and related services? $__________

Part VI: Current Concerns

39. Many government agencies have regulatory authority regarding aspects of the marine trades industry. Please check those with which you have had contact in the past two years. (Check all that apply).

Federal: ___U.S. Army Corps of Engineers ___Environmental Protection Agency
___U.S. Coast Guard ___Occupational Safety and Health Administration

State: ___Department of State ___Office of General Services
___Department of Environmental Conservation ___Department of Transportation

Local: ___Health Department ___Local government

Other: (specify)______________________________

40. Have you encountered difficulties in working with any of the above groups? ___yes ___no

If yes, please identify agency and situation ____

____

41. What specific information/educational programs would be of assistance to your business?

Technical (specify) ____

Business/mgt. (specify) ____

Other ____

42. What are the biggest problems/concerns facing you in your business?

____

____

THANK YOU !

APPENDIX 2

Responses received to survey questions #30 and #31

#30. What advantages does your marina have over the public marina?

- better care of boats
- better security
- we pay taxes, not use them
- less cost
- no waiting in lines
- no cost to taxpayer
- help is there 24 hrs/day
- club for members
- knowledgeable service
- privacy
- location
- personal attention
- diversified services
- better run
- friendlier personnel
- quality of services offered

#31. What advantages does the public marina have over your marina?

- public financing
- underpriced slips
- no taxes
- services
- lower rates from "non-profit concept"
- more improvements
- choice location
- private can't compete
- maintained better
- no compliance with regulations
- subsidized costs
- launch ramp
- less service fees
- unlimited funds
- bigger, better, cheaper
- more expensive facilities
- lower cost of facilities to customer