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OLD SAYBROOK'S MARINE
COMMERCIAL WATERFRONT:

Its Value to the Town,
Current Economic Conditions
and Future Prospects

John A. Auble and Norman K. Bender

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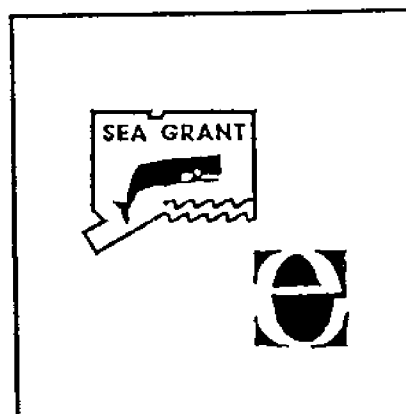


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A COOPERATIVE PROJECT OF
THE TOWN OF OLD SAYBROOK
AND
THE SEA GRANT MARINE ADVISORY PROGRAM
OF THE UNIVERSITY OF CONNECTICUT



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John A. Auble and Norman K. Bender*

INTRODUCTION

Connecticut's shoreline is experiencing development pressures which originated on the western edge of the State and are quickly expanding eastward. The need for proper planning and programs to channel these pressures has never been more evident than at the present time. Recognizing this, Old Saybrook's Economic Development Commission enlisted the service of the University of Connecticut's Marine Advisory Program to help study the Town's coastal resources and concerns. This study focuses on marine commercial waterfront land uses and their impact on the Town's economy. Information from the study will help the Town set definitive goals for the use of its coastal resources and to develop priorities for the types of development which will best serve the Town's interests.

METHODS

The data concerning local marinas were obtained through a survey developed by Norman Bender (UConn MAP). This survey was completed through personal interviews by Bender and representatives of the E. D. C. during Spring, 1985. Of the 11 marinas contacted, only one did not wish to participate in the study; so the figures represent a population of 10. The remaining information was gathered through personal visits and phone conversations with those listed in "Acknowledgements," by John Auble during Fall, 1985. In addition, the publications listed in the Appendix also were used to supplement data gathered from Old Saybrook.

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12. Edmund H. Mosca: Chief of Police
13. Olive P. Mulvihill: Tax Collector
14. Robert J. Walsh: Zoning Enforcement Officer
15. Old Saybrook Marine Patrol: Boat Tour, Ronald Baldi
16. Old Saybrook Marina Owners: Survey Participation

ECONOMIC DEVELOPMENT COMMISSION

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MUNICIPAL COASTAL PROGRAM

The Town of Old Saybrook completed a plan for a Municipal Coastal Program in 1982. This allowed the town to identify its coastal resources and needs and to set objectives and priorities for this area. The plan sets up a framework for managing the town's coastal resources. The plan notes that, "Planning for the coastal boundary area is a continuing process," and that, "further research and new information will be received; and goals, policies and specific proposals may be refined, updated and improved." The Saybrook Point Study is one example of this occurrence.

This report on marine commercial waterfront economic activity follows in the same manner. The Municipal Coastal Plan serves as a base and a direct link to the research conducted in this area. This report should be viewed as a supplement and used in close conjunction with the Municipal Coastal Plan. To aid this effort, areas of the plan directly related to this study have been listed in the following section with a brief description of their contents for cross-referencing.

A. Coastal Boundary Study Areas (pp 6-25)

"For the purpose of identifying and organizing coastal resource information, the Coastal Boundary Area of Old Saybrook has been divided into 20 'study areas'."

For each area the following is given:

1. "a brief description of existing land uses, coastal resources, physical conditions, zoning and other features."
2. "a summary of coastal problems, concerns and opportunities..."

B. Coastal Goals

1. People to the Shore (pp 36-39)

Goal: "to continue and increase opportunity for people to use and enjoy the amenities and resources of the shorefront..."

Existing Opportunities: The following are places and uses which categorize the enjoyment of the shoreline: 1) views, 2) beach, 3) boating, 4) fishing and 5) prominent locations

Policy:

1. preserve existing public access locations
2. encourage water dependent uses
3. recognize and manage the limited shoreline public access
4. coastal site plans should preserve viewsheds and encourage public contact with the shoreline
5. support coastal management policies for infrastructure development which do not adversely affect the coastal area

2. Recreation Boating (pp 43-45)

Goal: "to increase opportunity for recreation boating..., and to provide for the increase (of) a diversity of types of craft and the facilities to be used."

Existing Facilities:

1. area encompassing the 11 marinas -
4 locations described
2. protected and divided harbors
3. many protected, private locations
4. public launching locations or ramps
5. open water locations

Policy:

1. Encourage increased recreational boating use of coastal waters by
 - a. providing additional berthing space
 - b. limiting non-water-dependent uses precluding boating support facilities
 - c. increase state-owned launching facilities
 - d. provide for new boating facilities
2. To protect coastal resources from unfavorable boating facilities and uses
3. To encourage opportunity for the commercial fishing industry

3. Shorefront (Limited) (pp 48, 49)

Goal: "To continue the use and development of existing limited developed shorefront areas for marine-related uses...which enable people to have contact with the resources of the shoreline."

Policy:

1. to give highest priority to water-dependent uses
2. assure such water-dependent uses have adequate support land
3. avoid congestion of navigation channels
4. minimize adverse effects on shorefront from new development

4. South Cove (pp 61, 62)

Goal: "to retain South Cove as a water area for ecological and recreational values..."

Proposal: Undertake study addressing the following concerns:

1. improved pattern of water circulation
2. protection of coastal resources
3. improved potential for navigation and recreation boat anchorage
4. improved recreational use and public access
5. continued scenic view opportunity from the Causeway
6. maintenance of Causeway as a circulation route and to prevent its flooding

C. Administration (pp 63-66)

A listing and description of all public agencies known to be involved in the use, protection and enhancement of coastal resources. The local coastal issues are also listed along with the appropriate agency's involvement in that particular issue.

D. Citizen Participation (pp 67-69)

Understanding and support among citizens and property owners will be the basis for an effective Municipal Coastal Program. The process of preparing the Municipal Coastal Program involves learning and evaluation as well as the expression of personal views. Planning for the Coastal Boundary Area is a continuing process. Further research and new information will be received, and goals, policies and specific proposals may be refined, updated and improved. Continuing contact and dialogue with private and public interest groups will be essential.



THE WATERFRONT

Descriptions of areas
A-F on pages 5 and 6.

Borough of Fenwick

THE WATERFRONT

There are a variety of waterfront uses within the Town of Old Saybrook. Each use is a significant contribution to the complement of waterfront property. Not surprisingly, there is geographic separation with each region tending to favor one particular use. The largest single use of the coast is found stretching between Westbrook and the Borough of Fenwick.

A. The prominent feature of Old Saybrook's southern shore is a series of small beaches. Each beach is governed by a beach association. To accommodate the large numbers of small summer cottages, a typical association has a social activity center, a small beach and a few moorings off the beach. The associations account for most of the town's population doubling during summer months, and these "resident-tourists" generate a large amount of economic activity within the town.

Another unique feature of this area is the scattering of private docks along the shores of the small rivers. The total for the entire region is approximately 160 slips and 25 moorings, which includes about 40 slips in Indiantown found on the western edge of Old Saybrook.

B. At the mouth of the Connecticut River is the Borough of Fenwick which bends north into South Cove. This largely isolated area is relatively sparsely populated. Along with the centrally located golf course, the area includes a natural beach along the river and ten moorings at the entrance to South Cove. The bridge extending over South Cove is a popular fishing spot; however, the cove west of the causeway is mostly unused and mired in silt and controversy.

C. Directly north is Saybrook Point, an area of historical importance to the Town. Two marinas are located on the Point. Both cater to touring transient boaters. The northern edge of Saybrook Point borders North Cove and is lined with historical homes. Fourteen slips were also noted in the area. Continuing round the inner shore of North Cove are condos, a yacht club, Saybrook Products, Inc., and the old dumping ground which is still owned by the town. The most prominent feature of North Cove is the assembly of 150 moorings regulated by the town. The dock next to the yacht club is also used by fishermen, crabbers and as a beautiful viewshed.

D. Further north is the central area of marine activity. This area is separated from North Cove by approximately 1/2 mile of open wetlands. Six marinas are clustered around the Baldwin Bridge. These six are involved with the "working aspect" of marinas and the majority of local repair work is done at these marinas. At the southern fringe of this region is found another marine activity.

On the canal leading to Ragged Rock Marina is the town's commercial fishing center known locally as "Ted's." Ted works with other fishermen to wholesale fish mainly to Fulton's Market in New York City. During peak season, several hundred pounds of fish are processed each day. The operation includes a small supply shed with refrigeration facilities. This is an important outlet for local skiff trawlers as well as line fishermen hoping

only to earn gas money. When certain species are in season, Ted's also supplies local restaurants with some of their fresh fish. Though a relatively small operation, Ted's provides an important added diversity to the local marine community.

E. The last group of marinas is located north around Ferry Point in a small cove. These three marinas offer few support services. At the back of the cove is Anchorage Lane, a small canal lined with homes which accommodates 20-25 boats along the bulkhead. Ten private moorings are located at the cove's entrance along with a small canal. This canal has dockage for about 10 small boats and leads to Brockway's, a small-boat builder who also lifts and stores about a dozen boats. Brockway's is on a similar scale to Ted's and is just as important a contributor to the waterfront.

F. The final stretch of coastline begins with several acres of preserved wetlands. This leads to a spacious residential area of large houses and grounds. Several of the homes have small private docks as well as a few moorings off their shore property.

Old Saybrook has a well-defined balance of waterfront activities. The diversity ranges from the 946 slips and moorings owned by marinas to the 261 which are privately owned and another 175 controlled by the town. It includes large operations, like Hull Harbor, to smaller scale-ventures such as Ted's and Brockway's. Public and private, large and small, this survey enables one to view the coast as a group of related waterfront activities. Understanding these relationships is instrumental for future planning and development.

MARINAS

Old Saybrook's marinas are the centerpiece of the town's marine commercial waterfront activities. Not only do they act as a major economic impetus, they also have a strong physical presence. This presence was documented through a town survey and is shown in the table below.

<u>Land</u>		<u>Feet</u>	<u>% of Total</u>
Shore frontage owned or rented	:	11,550	100
Currently in use	:	8,200	71
Suitable for future use	:	2,450	21
Unsuitable for future use	:	900	8
		<u>Acres</u>	<u>% of Total</u>
Total acres owned or rented	:	79.5	100
Acres currently used	:	30.5	38.4
Acres available for development	:	10.5	13.2
Unavailable for development	:	38.5	48.4

Most of the acres unavailable for development are wetlands and/or large stands of phragmites. A discussion of marina land uses is in the following sections.

Employees

	<u>Yr. Round</u>	<u>Seasonal</u>
Full-Time	40	16
Part-Time	16	31

The size of the workforce is one indicator of an industry's economic influence but may not be the most important. A major factor influencing marinas' economic activity is the number of slips and moorings.

Slips and Moorings

1. Coastal Area Management survey of Old Saybrook:

	<u>Slips</u>	<u>Moorings</u>	<u>Total</u>	
1976	660	10	670	
1982	996	80	1076	(60% increase from 1976)

2. Survey of 10 marinas:

	<u>Slips</u>	<u>Moorings</u>	<u>Total</u>
1982	753	N.A.	753
1984	879	67	946
(Projected) 1985	897	64	961 (28% increase from 1982)

The total number of slips and moorings is not as important as the growth trend of these numbers. As the primary base for generating revenue, its growth is a strong indicator of the marina industry's vitality. The two items above show a dramatic growth felt throughout the town.

Besides marinas, 17 other marine-related businesses were counted in Old Saybrook (listed in Appendix 4). A few are recent additions. Their success is directly related to that of the marinas, which means they depend upon a strong marine industry. Together, these businesses and other water-related activities comprise the local marine community. The following sections survey this community and its inter-related activities and issues.

MARINE COMMERCIAL LAND

The 1982 Municipal Coastal Program recommended zoning re-evaluation "to be certain that water-dependent uses are encouraged and other uses which by the market could displace water-dependent uses are excluded." In other words, is the amount of marine commercially zoned land sufficient for the future needs of the town's marine industry? Presently, it is sufficient. This was determined by surveying the current utilization of marina-owned land within Old Saybrook.

Marina owners were asked to account for the use of their land:

	<u>Acres</u>	<u>% of Total</u>
1. Total acreage owned or rented	79.5	(100)
2. # acres currently used	30.5	(38.4)
3. # acres available for expansion	10.5	(13.2)
4. # acres unavailable		

If developed and developable acreage (#2 and #3) is considered as 100% of capacity utilization, the town's marinas are currently operating at 74.4% (#2/#2+#3) of total capacity. It appears this has been the case for the last decade. A 1976 CRERPA study revealed that eight marine commercial acres were available for expansion compared to the 10.5 acres available today. (Note: The 2.5 acre increase may be the result of different sources. Current results are from marina owners while CRERPA used ecological and town zoning maps.) Thus, it appears that marinas in Old Saybrook have not experienced space problems. But, is there sufficient land for future expansion needs?

Though it is impossible to determine the exact amount of land needed for future expansion, this can be reviewed by discussing possible types of expansion. Two distinct types of expansion needs have been identified. One is adding more slips and moorings and the second involves land-based support services such as engine repair, storage, hull work, etc.

Nationally, demand for slips and moorings outpaces the supply. The same is true in Old Saybrook where marina owners have made this an expansion priority. They feel this is their most pressing expansion need. To back this conclusion, eight of ten owners revealed they turned away 700-800 customers. According to the seven owners who specifically wanted more slips, their total expansion would be approximately 500 new slips. This would represent a 52% increase of the present total. There has been a 45% increase since 1976 so it is conceivable that this large increase could be realized within the next 10-15 years. In contrast to the magnitude of this expansion, only four owners mentioned some minor expansion of their land-based support services.

Land-based support services seem to be the least pressing of owners' expansion concerns. Though four mentioned a need, they were on the scale of a single mechanic or maybe a few new storage racks. So rather than from the owners, the need for this type of expansion comes from other sources. Referring specifically to the two marinas on Saybrook Point, the 1982 Saybrook Point Study said, "Marinas at Saybrook Point are somewhat disadvantaged in

Point Study said, "Marinas at Saybrook Point are somewhat disadvantaged in that they do not have extensive land-based services." There is evidence that the rest of Old Saybrook's marinas are affected similarly to those on Saybrook Point. The importance of these services was noted in the Thames Street Study for the City of Groton: "In most instances, the onshore rate of return per dollar of investment is higher than offshore return. Thus, repairs, hardware, accessories, supply sales, fuel and restaurant facilities generate the greatest proportion of marina profits." [emphasis is theirs]. The following table of average marinas in the State and specifically within Old Saybrook further reveals this concern.

	<u>Old Saybrook</u>	<u>Connecticut</u>
1. Average Gross Income	\$332,143	\$609,648
2. Average Gross Sales/ # slips + # moorings	3,456	7,792

The difference between Old Saybrook's and the State's figures could be the result of two variables: Old Saybrook's marinas either charge considerably less for slips and moorings than the state as a whole, or, Old Saybrook's marinas receive much less revenue generated by land-based services than the rest of the state's marine industry. Most likely, the discrepancy results from a combination of both. But, if one extreme is taken and it is assumed revenue from land-based services is equal, then the conclusion is that Old Saybrook charges 44% (\$3,456/\$7,792) of the state's average fee for slips and moorings. The importance of this discrepancy might be debatable but it remains a valid consideration in development planning and efficiency.

There have been recent developments in Old Saybrook that affect this discussion of expansion planning. Several local marinas have proposed expansion of their slips and moorings. This is not surprising considering the expansion direction of the owners noted in the survey. In contrast, a local developer has initiated plans to build a new marina complex which would emphasize the "working aspect" of land-based services. This proposed complex would also include the addition of many new slips, partially addressing the greatest expansion concern of most marina owners in Old Saybrook. Between additional berthing and land-based support services, the number of expansion proposals is quickly increasing. These types of development, and the eventual realization of some, demonstrate the need for co-ordinating economic development planning between the marina industry and the Town of Old Saybrook.

MARINE-GENERATED REVENUE TO TOWN

The town of Old Saybrook benefits financially from the marine industry directly and indirectly. Indirect benefits are measured by figures for "local added value" and by using multipliers. Direct benefits are accrued through taxation. Taxation's importance is enhanced because it has the advantage of being an effective tool in the town's economic planning. Part of the taxation benefit is no longer under the town's control.

Until a few years ago, Old Saybrook collected a property tax on all boats registered in the town. The boats were assessed, then a tax was levied based upon the current mill rate. The State Department of Motor Vehicles now controls the tax and distributes available monies to towns who formerly collected it. The state used 1978 as the base year for funding considerations. Old Saybrook collected \$35,026.95 in 1978. Fortunately, after accounting for its own expenses, the State Department of Motor Vehicles has been able to approximate 100% funding. The town received \$34,563 in 1983 and \$35,027 in 1984. Though Old Saybrook no longer controls this part of its tax base, it still financially benefits from it.

Old Saybrook still realizes an effective economic tool in local property taxes. Part of its utilization is determining the respective contributions from residential property and commercial/industrial property. After the reassessment in 1979, residential contribution increased significantly. It increased from 70% to 84% of the total tax base while commercial/industrial decreased from 30% to 16%. The town's marinas were a part of this decline.

	<u>1976 (CRERPA)</u>	<u>1984 (Town Survey)</u>
Usable Acreage	37	41
Total Property Taxes	\$101,453	\$95,461
Average Tax/Acre	\$ 2,742	\$ 2,328

The two sets of figures document the tax situation before and after the 1979 reassessment. It is apparent that the local marinas have not suffered any excessive economic strain from property taxes. Of the \$95,461 total for 1984, \$7,078 was personal property and \$88,382 was from real estate.

Measures of financial benefits such as "local added value" and multipliers are considered indirect revenues because there is no formal calculable collection of this money. Rather, this is economic activity generated by the marine industry which permeates the entire scope of the town's economy. The more tangible of the two is the "Local Added Value."

I. Local Added Value

1. Payroll	\$ 975,000	
2. Interest Paid	308,750	(10 firms)
3. Rent	<u>286,130</u>	
Total	\$1,569,880	Average = \$156,988

II. Multipliers

Additional Gross Sales	:	Total Marina Gross Sales	\$3,321,428
		New England Gross Sales	
		Multiplier	<u>x.9</u>
			\$2,989,285

While these figures are impressive, they do not come without qualifications. Most important, this additionally generated economic activity does not completely remain local. Also, multipliers are most effective when used relative to other economic activities because all activity experiences a multiplier effect.

Finally, Old Saybrook's marinas also help by providing a net trade surplus for the local economy. Only 14% of their total business was accrued from Old Saybrook residents. The rest of Connecticut provided 62% of total business while out-of-state customers accounted for the remaining 24%. Thus, while the town receives much financial benefit from the industry, its value is further enhanced because 86% (\$2,856,425 gross sales) is initiated from non-local sources. These outside funds greatly support the local economy's growth.

MARINA ALTERNATIVES

Connecticut's Coastal Area Management Act recognizes a preference for water-dependent use over water-enhanced uses of the coast. Rather than being an explicit directive, this law acts more as a guide to development proposals and leaves a great deal of autonomy for local decision. A very real example of this choice is a potential choice between marinas versus residential uses (i.e. condominiums). Many Connecticut marinas are experiencing pressures to sell and to immediately realize the real value of their property. The source of this pressure is often alternative developments such as condominiums or some form of dockominiums involving the sale of slips. This pressure is then extended to coastal towns and their own development plans.

A. When determining a development preference, a town must weigh economic and social considerations. To demonstrate the economic considerations, a comparison of marinas and condominiums was done using the town of Stonington in 1982. The following table reveals condominiums as a direct source of revenue to the town while marinas provide more of an indirect source of revenue. (NOTE: The importance of this table is not the specific dollar values. It is provided for better understanding of how each type of development contributes to the local economy.

<u>Average Marine Facility</u>		<u>Average Condominium Complex (36 Units)</u>
1. Real Estate Tax	\$2,343.88	\$51,840
2. Personal Property Tax	<u>385.14</u>	<u>15,552*</u>
(Direct) Total Tax	\$2,429.02	\$67,392
3. Local Added Value		
Payroll	\$85,173.00	\$32,400**
Interest paid	31,854.00	4,500***
Rent paid	<u>28,613.00</u>	<u>3,000****</u>
(Indirect) Total	\$145,640.00	\$39,900
Total Generated Revenue	\$148,369.00	\$107,292

*2 autos (\$12.00 assessment (36 mill) x 36

**Owner's Maintenance \$75.00 x 12 mos. x 36

***Maintenance and landscape contract

****Insurance

As shown above, condominiums show much greater direct revenue (taxes), but lag substantially behind marinas in indirect revenue from local added value. This type of development spurs a flurry of economic activity at the outset, but once completed, retains a consistently lower level of activity. The new Oyster River condominium complex is a recent example of this in Old Saybrook.

This complex consists of 20 units averaging a \$175,000 market price and a small 20 slip marina. The slips are not sold, but each unit owner is entitled to use one. Of the 17 units sold, only two owners keep a boat at the marina. Oyster River is a water-enhanced use of the coast. The marina appears to be incidental to the complex though the coastal location definitely enhances its value.

Contrary to condominium development, a marina depends upon a strong economic relationship with the local community. The ideal economic solution would be to maximize both indirect and direct revenues. This situation is emerging at River Landing Marina with the sale of some of its slips.

B. The outright sale of slips is quickly becoming a popular alternative to the traditional marina. This type of arrangement is commonly known as a dockominium. Often, the facilities are limited to slips and a central locker area. Under this form, dockominiums are more economically similar to a condominium complex than a marina. It becomes a source of primarily direct revenue. But when complete support services exist like at River Landing Marina, its economic nature changes and its value increases tremendously.

Formerly a traditional marina, River Landing Marina now reserves approximately half of its 274 slips for rental and is selling the remaining slips. These slips range from \$30,000 to \$50,000, of which 83 have been sold. In addition, the marina also has a full complement of land-based support services. These serve the public in the usual manner and also serve the new slip owners. The owners are part of an association that has a management contract specifically with the marina. As a gauge of its success, the marina has expansion plans for all three aspects of its operation: rental slips, slips for sale, and support services. The end result is a very favorable economic situation for the town. The marina has added significantly to the tax base with the sale of slips and remains a vital source of indirect revenue.

The economic considerations are the easiest to review with alternative developments. But there still remains the social considerations and effects. Thus, the final decision must come from a weighing of how a new type of development fits into the municipal plan of development and the desired character of the town.

WATERFRONT COMMISSION

Old Saybrook's coastal activity is not made up entirely of private concerns, though they are the dominant force. The town also is an influential factor. Evidence of this is Old Saybrook's Waterfront Commission. The Commission's primary responsibilities are to oversee the entire coastal situation and, more specifically, to regulate town-owned facilities. These facilities include the moorings on North Cove and the town dock on Ferry Road. Even though both are run by the town, they are quite different from each other. North Cove is geared for pleasure sailing yachts while the town dock is run with the emphasis for commercial fishermen. This sort of purposeful diversity is consistent with the well-balanced diversity of the entire coast discussed earlier.

A. The North Cove facility is a federally preserved area with 150 moorings. One mooring is reserved for transients and the rest are rented seasonally. Federal law mandates that the mooring applications be available in a four-state region. Most rentals are from Connecticut but few are specifically from Old Saybrook. This facility's popularity is demonstrated by a turnover rate of only 20-30 from a waiting list of 164. This popularity easily endured the \$50 rental increase to \$200 last year. The total increase since 1976 has been \$120, a 150% increase. This is not an unusually large increase, but it is in contrast to the zero increase at the town dock during the same period.

The lack of an increase at the town dock results from the Commission's policy to attract commercial fishermen. By giving slip priority to local fishermen at a favorable rate, the Commission hopes to stimulate growth of the town's commercial fishing industry. Currently, half of the 25 slips are rented to commercial fishermen. The Commission is optimistic that the dock will be completely commercial in the foreseeable future.

B. The Waterfront Commission also acts as the town's voice with coastal issues. These issues range from approving the addition of slips and moorings to discussion of major coastal changes. North and South Cove are examples of the latter. The town is currently reviewing plans to finance an expansion of the North Cove moorings. The South Cove debate is not as nearly settled. Some sources believe South Cove could be a better anchorage than North Cove. Presently, it remains undeveloped with scores of questions still being debated. The issue has been quiet recently, but issues relating to Old Saybrook's last potential area of major coastal development promises to resurface until the issue is settled. Due to these types of issues, the Commission is currently developing a plan for harbor management. Adoption of such a plan would provide comprehensive guidelines for the use of all Old Saybrook's waters.

By implementing policies like that at the town dock, the Waterfront Commission helps to coordinate coastal activity in the most beneficial manner for the entire town. The Commission has shown the ability to identify needs and fill them. It provides valuable direction to the entire coastal development scheme.

APPENDICES

1. Waterfront Uses
2. Slips, Moorings and Transients
3. Available Facilities and Services at Marinas
4. List of Marine-Related Businesses
5. Marina Land Use
6. Economic Status of Marina Industry
7. Survey of Marine Commercial Waterfront Land Uses
8. Sources

APPENDIX 1

WATERFRONT USES

Region	Boating Facilities	Businesses On Water	Primary Type of Residence	Beaches	Wetlands
A	160 private slips 25 private moorings	None	High-density cottages A few condo- miniums	1 Town 1 Commer- cial 7 Private	Extensive Along Rivers
B	10 private moorings	Nothing commercial Private golf course	Large single family homes	1 Private	Most of South Cove Perimeter
C	14 private slips 180 public slips 150 public moorings	1 marina 1 marina/motel 2 restaurants 1 yacht club	Small single family with historic areas on S.P. Condos off Cove	No beaches Small State park	Areas off North Cove
D	527 public slips 60 public moorings 1 State boat ramp	6 marinas 1 shop and eating complex 1 fish house	Small older homes behind marina	None	None
E	32 private slips 10 private moorings 202 public slips 2 public moorings	3 marinas	A few large houses behind marinas and lining canal	None	None
F	4 private slips 3 private moorings	None	Several large estates	None	Most of the riverfront

APPENDIX 2

SLIPS, MOORINGS AND TRANSIENTS

	<u>TOTAL</u>	<u>MEAN*</u>	<u>RANGE</u>	<u>COMMENTS</u>
Slips	884	98.2	30-240	Even Distribution within Range
Moorings	62	6.7	0- 60	1 Firm = 60, 1 Firm = 2
Transients	2150	238.9	0-1000	3 Firms Account for 2,000

* Mean calculated using nine (9) firms. One firm replied "Not Applicable" for all three categories.

APPENDIX 3

AVAILABLE FACILITIES AND SERVICES AT MARINAS

	Saybrook Point Marina	Hull Harbor Cove	Oak Leaf	Yacht Dist.	Seth Perrison	River Landing Marina	Ferry Point	Ragged Rock	Offshore East	G.A. Plumb	Saybrook Marine Serv.*	TOTAL
Moorings						X			X	X		3
Slips	X	X	X	X		X	X	X	X	X	X	10
Inside Winter Storage			X		X	X	X					4
Outside Winter Storage	X		X	X	X	X	X	X	X		X	9
Dry-Stock Berthing												-
Public Launch												-
Fuel - Gas	X	X	X	X		X	X	X			X	8
Fuel - Diesel	X	X	X			X	X	X			X	7
Boat/Engine Repair	X	X	X	X	X	X	X	X	X	X	X	11
Boat/Charter Rent	X	X	X			X		X				4
Rest Rooms	X	X	X	X	X	X	X	X	X	X	X	11
Equip.Sales:Parts		X	X	X		X	X		X	X		7
Ship Stores	X	X	X	X	X	X	X	X	X			9
Laundry	X	X	X						X			4
Food (Snacks)	X		X			X		X				4
Ice	X	X	X	X		X	X	X	X		X	9
Fish Tackle		X		X								2
Boat Sales		X		X		X						3
Yacht Brokerage		X	X	X		X		X	X	X		6

* From Saybrook's Municipal Coastal Program. 1982.

APPENDIX 4

LIST OF MARINE-RELATED BUSINESSES

In addition to the 11 marinas in Old Saybrook, 17 other marine-related firms were identified. The most popular service was Boat Sales, with six of the firms actively engaged in this. Supplies and Canvas were the next two most popular services, along with Engine Repair.

1. Brockway's Boat Building
2. San Juan Yachts
3. Damar Ltd.
4. Lind-Samskar Yachts
5. Conn. Marine Center, Inc.
6. Custom Marine, Inc. - Yacht Division
7. Andy's Trim Shop: Boat Covers, Tops and Upholstery
8. Sobstad Sailmakers, Inc.
9. Kellog Marine Supply
10. D & L Marine Supply
11. Marine Propulsions Hydraulic Gear: Engine Repair
12. Miller Yacht Engine Service
13. Horan Michael Yacht Service
14. Coastwise Documentation, Inc.
15. Bombali Construction Co.: Marine Contractor
16. Saybrook Fish House
17. Ted's Supply and Fish Wholesaling

APPENDIX 5

MARINA LAND USE *

Linear Feet of Shore Frontage

	<u>Total</u>	<u>% of Total</u>	<u>Mean</u>	<u>Median</u>	<u>Range</u>
Total Linear Feet	11,550	100	1,155	950	150-2500
Feet in Use	8,200	71	820	750	150-2300
Suitable for Expansion	2,450	21	245	0	0-900
Unsuitable for Expansion	900	8	90	0	0-900

Land Acreage

	<u>Total</u>	<u>% of Total</u>	<u>Mean</u>	<u>Median</u>	<u>Range</u>
Total Acres	79.5	100	7.95	4.1	1.5-27
Acres in Use	30.45	38.4	3.05	2	1-9
Suitable for Expansion	10.5	13.2	1.05	.75	0-3
Unsuitable for Expansion	38.55	48.4	3.85	.275	0-24

* 10 Marinas Responding

APPENDIX 6

ECONOMIC STATUS OF MARINA INDUSTRY

	NO. OF RESPONDENTS	TOTAL	PROJECTED TOTAL(10)	MEAN	MEDIAN	RANGE
Gross Income	7/10	\$2,950,000	\$3,321,428(100%)	\$332,143	\$450,000	\$75,000-875,000
Sources of G.I.:						
Old Saybrook	7/10	277,500	465,000(14%)	39,642	22,500	0-125,000
In-State	7/10	2,007,500	2,054,285(62%)	286,785	280,000	37,500-700,000
Out-of-State	7/10	665,000	797,143(24%)	95,000	70,000	18,750-225,000
Wages, Salaries and Commissions	8/10	755,000	943,750	94,375	87,500	5,000-225,000
Debt Interest	8/10	247,000	308,750	30,875	7,000	0-125,000
Property Taxes	*	95,461	-	8,678	8,670	1,740- 31,133

* Figures from Tax Collector's office, which include all 11 marina firms within Old Saybrook

APPENDIX 7

SURVEY OF MARINE COMMERCIAL WATERFRONT LAND USES

Ten of Old Saybrook's 11 marinas participated in the survey.
The following results are based upon those 10 respondents.

1. LOCATION: Saybrook Point - 2; Connecticut River - 4; Coves - 4
2. LENGTH OF BUSINESS YEAR: 8 opened all year; 2 opened from April-October
3. SOURCE OF BUSINESS:

Year-round Old Saybrook Residents:	14%
Connecticut Residents - Not Local:	62%
Out-of-State	24%

4. EMPLOYEES:

	<u>Year-Round</u>	<u>Seasonal</u>
Full-Time	40	31
Part-Time	16	16

5. AVAILABLE SERVICES (#Firms Offering Service)

Moorings	3	Equipment Sales	8	Ice	8
Slips	9	Boat/Engine Repair	10	Fishing Tackle	2
Inside Winter Storage	4	Boat Charter/Rental	4	Boat Sales	3
Outside Winter Storage	8	Rest Rooms	10	Yacht Brokerage	6
Dry-Stack Berthing	0	Parts Sales	7		
Public Launch	0	Ships Store Sales	9		
Gas	7	Laundry	4		
Diesel	6	Food (Snacks)	4		

6. BUSINESS OTHER THAN MARINE: Yes - 4 (Motel, Gravel Pit)
No - 6
- Restaurant Facilities: Yes - 3 (2 small cafes, 1 formal and informal dining area)
No - 7

7. PARKING: 9 have designated area - 1,684 cars
6 can expand if needed - 360 cars

8. BOATS RENTING SPACE:

	<u>84</u>	<u>85 (Projected)</u>
Slips	879	897 - 1 firm adding 18
Moorings	67	64 1 firm adding 1-3; 1 firm losing 5
TOTAL	946	961

MARINA SURVEY RESULTS (Cont'd.)

9. NUMBER OF TRANSIENTS: 6 accommodate transients - 2,150 total
10. FULL UTILIZATION OF FACILITIES:
- Winter Storage: 6 of 8 (1 isn't because space was just added)
Slips: 8 of 9
Mooring: 1 of 3
- Turning Away Customers: 8 700-800 total customers
on Waiting List: 275 people - few keep waiting lists and
not all rejected customers
willing to wait
- Firms turning away customers indicate need for at least 500
additional slips, 100 winter storage and 1 mechanic
11. PUBLIC WATER: - 9 firms use public water; 1 did not answer
12. LINEAR FEET OF SHORE FRONTAGE:
- a. Owned, leased or rented: 11,550
b. Currently in use: 8,200
c. Suitable for Future Use: 2,450
d. Unsuitable for Future Use: 900
13. LAND ACREAGE OF BUSINESS:
- a. Total land: 79.5 acres (of 38.5 acres unavailable
b. Amount currently used: 30.5 for expansion, 2 firms
c. Available for expansion: 10.5 account for 36 acres)
14. INCREASED PHYSICAL CAPACITY OF FIRM IN LAST FIVE YEARS:
- Yes: 3 - slips, docks and additional services
No: 7
- Is business physically able to expand?
- Yes: 10 - slips top priority, plus docks, parking and
additional services
15. IS DEMAND SUFFICIENT TO CONSIDER EXPANSION?
- Yes: 9
No: 1
- Are you considering expansion within next few years?
- Yes: 9 (7 want slips, 4 will increase maintenance)
No: 1

MARINA SURVEY RESULTS (Cont'd.)

16. <u>DREDGING:</u>	Yes	Your Facility	Marked Channel	Don't Know
Has it occurred?	7	6	4	
Current need?	5	5	2	
Need within 5 years?	8	7	3	2

17. FUTURE DEVELOPMENT WITH NO RESTRAINTS:

2 would retain status quo
1 did not reply
Most would dramatically increase number of slips (1500 + total)
1 emphatically said no to condominiums
1 envisioned a complete seaside resort complex

18. GROSS BUSINESS INCOME: 7 of 10 responded

Total of 7 = \$2,325,000
Average = 332,143
Total of 10 = 3,321,428

19. TOTAL WAGES, SALARY AND COMMISSIONS: 8 of 10 responded

Total of 8 = \$780,000
Average = 97,500
Total of 10 = 975,000

20. TOTAL PROPERTY TAXES: \$86,065 from 10 firms surveyed

Total of \$95,461 from Town tax records

21. TOTAL DEBT SERVICE: 8 of 10 responded

Total of 8 = \$247,000 (3 of 8 answered \$0)
Average = 30,875
Total of 10 = 308,750

22. BOAT VALUE RANGE AT FACILITY: Applicable at 9 of 10 firms

3: \$ 1,000 - 110,000
3: 1,000 - 500,000
2: 3,000 - 1,000,000
1: 25,000 - 3,000,000

23. AVERAGE VALUE OF BOATS AT FACILITY: \$60,555.55

APPENDIX 8

SOURCES

1. Connecticut River Estuary Program - Connecticut River Estuary Regional Planning Agency for Connecticut Coastal Area Management Program. November, 1976.
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3. Saybrook Point Study - Lane, Frenchman and Associates, Inc. for the Town of Old Saybrook. October 15, 1982.
4. Directory of Boating Facilities - Office of Connecticut's Coastal Area Management. January, 1983.
5. Connecticut's Recreational Boating Industry: An Economic Evaluation - University of Connecticut Cooperative Extension Service, Marine Advisory Service, Fact Sheet #6. 1983.
6. Town of Stonington: Economic Comparison of Generated Revenues Between Condominium Complexes and Marinas or Boatyards - University of Connecticut Marine Advisory Service. 1982.
7. Stonington's Marinas and Boatyards: An Economic Analysis of the Industry and Its Impact on the Local Economy - University of Connecticut Marine Advisory Service. 1982.
8. Thames Street Study: City of Groton. Lane, Frenchman and Associates, Inc.; Economics Research Associates; Vanasse/Hangen Associates, Inc. for the City of Groton. October 31, 1982